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ABSTRACT

This book contains 310 charts, tables, and graphs containing statistical information about agriculture-related commodities and services, primarily in the United States, in 1986. The book is organized in seven sections that cover the following topics: (1) the farm (farm income, farm population, farm workers, food and fiber system, agriculture and the general economy, assets and finance, prices, inputs, costs and returns, land use, land values, land ownership and drainage, irrigation, conservation, productivity, and cooperatives); (2) population and rural development (farm-dependent counties, population and income, poverty, taxes and employment, local government, and rural finances); (3) the consumer (economic indicators, consumer prices, farm share, food marketing costs, food consumption, family food costs, Vitamin E, diet, and family economics); (4) food and nutrition programs (food stamps, Women, Infants, and Children--WIC--program, child nutrition and food distribution); (5) U.S. trade and world production (farm trade, international indicators, United States trade, world production, and world trade); and (7) commodity trends (livestock, dairy, poultry, wheat, rice and other grains, commodity stocks and fats and oils, fibers, vegetables, fruit, nuts and tropical products, tobacco, and transportation). A subject index to the charts includes contact persons for the charts. (KC)

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Contents

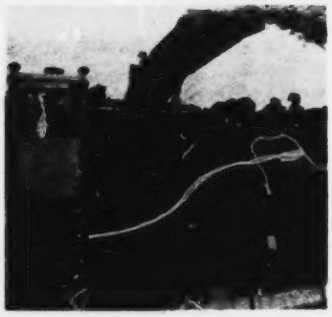
3 **The Farm**
4 Special Section: A Look at Farm Income
6 Farm Population
7 Farmworkers
8 Income
11 Food and Fiber System
12 Agriculture and the General Economy
13 Assets and Finance
16 Prices
17 Inputs
20 Costs and Returns
22 Land Use
24 Land Values
26 Land Ownership and Drainage
27 Irrigation
29 Conservation
32 Productivity
33 Farmer Cooperatives

37 **Population and Rural Development**
38 Farm-Dependent Counties
39 Population and Income
41 Poverty
42 Taxes and Employment
47 Local Government
48 Rural Finances

49 **The Consumer**
50 Economic Indicators
52 Consumer Prices
53 Farm Share
54 Food Marketing Costs
55 Food Consumption
57 Family Food Costs
58 Vitamin E
59 Diet
60 Family Economics

64 **Food and Nutrition Programs**
65 Food Assistance, Food Stamps, WIC
66 Child Nutrition and Food Distribution

67 **U.S. Trade and World Production**
68 Special Section: A Look at Farm Trade
70 International Indicators
71 U.S. Trade
82 World Production
86 World Trade



93 **Commodity Trends**
94 Livestock
97 Dairy
99 Poultry
102 Wheat
103 Rice and Other Grains
105 Commodity Stocks and Fats and Oils
106 Fibers
109 Vegetables
111 Fruit
112 Nuts and Tropical Products
114 Tobacco
116 Transportation

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1986 Outlook Conference Chartbook

Charts used at the 1986 Agricultural Outlook Conference will be compiled and published for the first time this year following the conference. Call Diane Decker at (202) 786-1494 for ordering information.

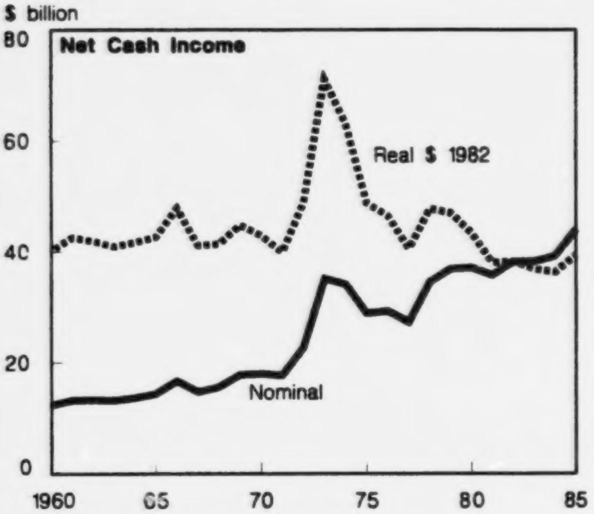
The Farm

A Look at Farm Income

Farming is still basically profitable. But the huge debts incurred—as a result of vigorous investment in the late 1970's undercut by declining land values in the 1980's—have overwhelmed the debt-carrying capacity of earnings on some farms.

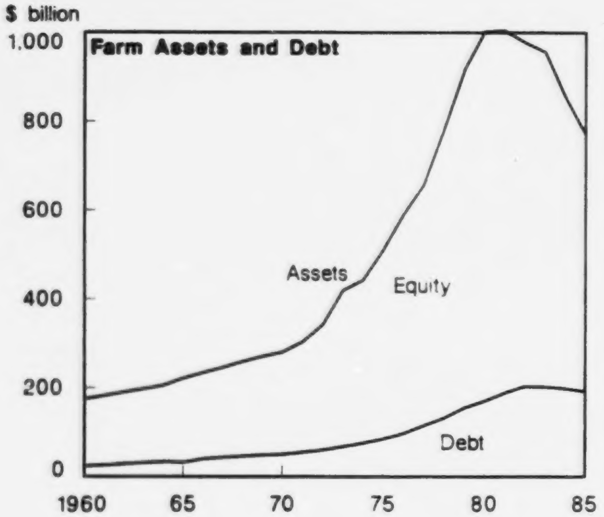
(A)

Net cash income was about $45 billion in 1985, and will likely stay near that record in 1986. Since there are about 1.5 million fewer farms today than in the 1960's, average real net cash income per farm is now much higher.



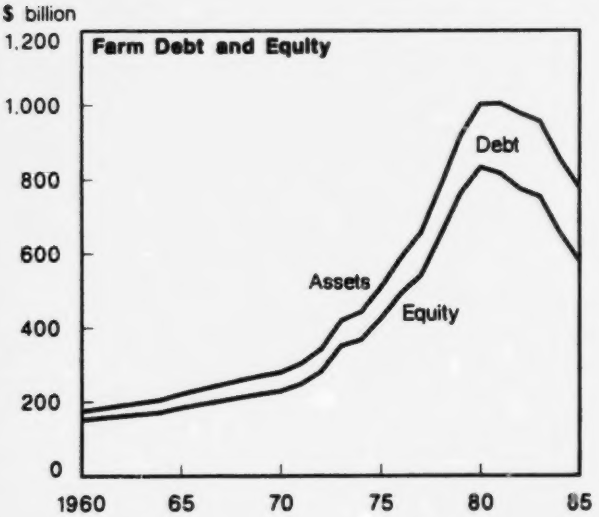
(B)

After rising steadily, the equity of farmers and nonoperator landlords has fallen since 1981. Farmers have reduced debts slightly, but their asset values have dropped over 20 percent from a 1981 peak of over $1 trillion.



(C)

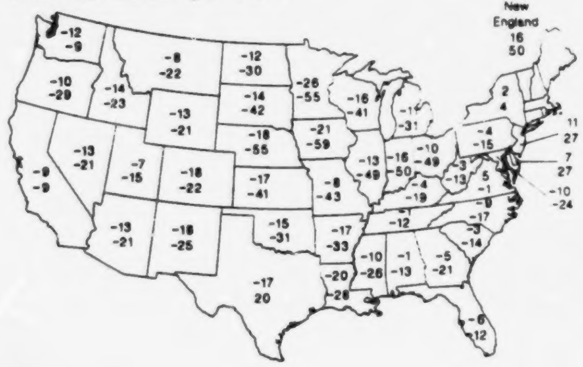
Many farmers who borrowed heavily in the late 1970's were not able to cover debt payments from farm earnings alone. They counted on borrowing against rising equity values—mostly in land—to meet cash flow.



(D)

Thus, for farmers unable to cover debt payments from farm earnings alone, all that was needed to bring on a crisis was for farmland inflation to slow. Land values actually declined after 1981.

Percentage Change in Average Value of Farm Real Estate per Acre


New England
16
50
-12
-9
-10
-29
-14
-23
-8
-22
-12
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-14
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-13
-21
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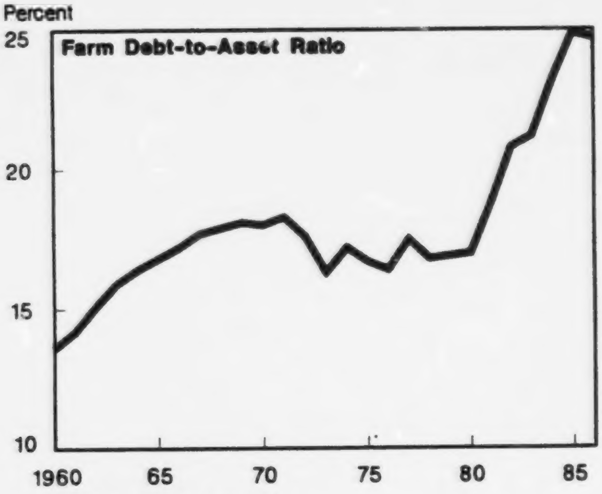
-28
-17
20
-6
12

Top number is change from April 1, 1985 to February 1, 1986.
Bottom number is change from February 1, 1981 to February 1, 1986.

(E)

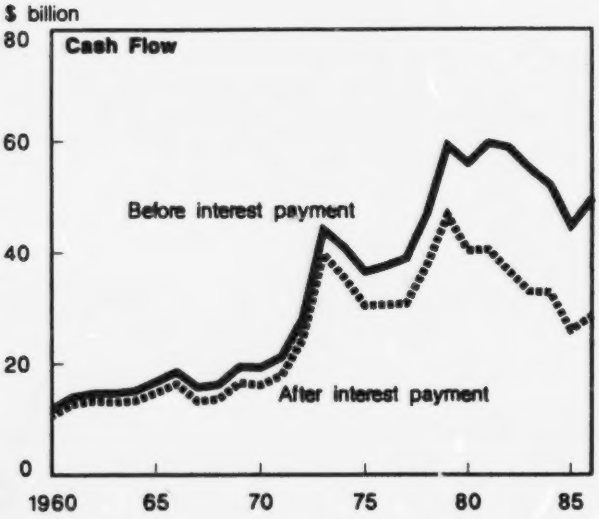
When asset values began to drop after 1981, the debt/asset ratio (debt as a percentage of assets) soared. Although debts were no longer rising, asset values were falling.



1986 preliminary. Excludes households.

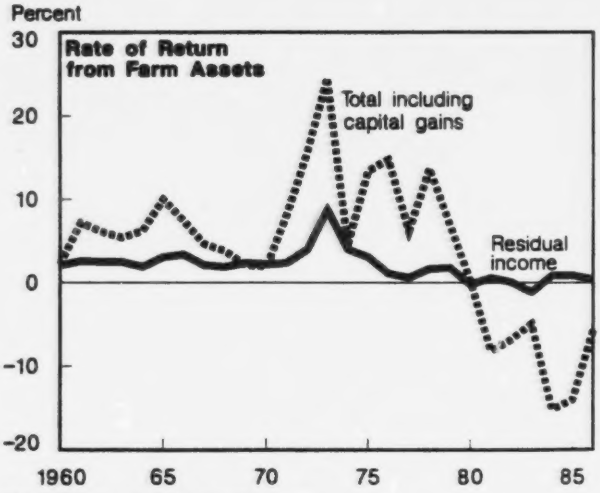
(G)

Rising debts and interest rates took their financial toll on many farms after 1973. Since farm debt is highly concentrated on less than half the farms, heavily indebted farms are affected more than shown, and low-debt farmers are much better off.



(F)

Returns on assets from residual income (from the farm operation itself) have been relatively stable. Over half the returns on farm investment in the 1970's came from capital gains.



1986 preliminary. Excludes households.

(H)

Total farm operator debt should decline substantially over the next 2-3 years as CCC lending levels off and declines and as unpayable loans are written off. The 1986 debt as a percentage of assets (debt-to-asset ratio in table below) about matches 1985 even though debt is declining, principally because asset values are also declining.

Farm Sector Debts and Assets

Item	1983	1984	1985	1986
		$ billion		
Assets:				
Real estate	736.1	639.6	559.6	510 to 570
Total assets	956.5	856.1	771.4	725 to 775
Liabilities:				
CCC loans	10.8	8.7	16.9	20 to 24
Total liabilities	202.5	198.9	192.1	184 to 192
Total farm equity	754.0	657.2	579.3	525 to 585
		Ratio		
Selected ratios:				
Debt-to-asset	21.2	23.2	24.9	23 to 27

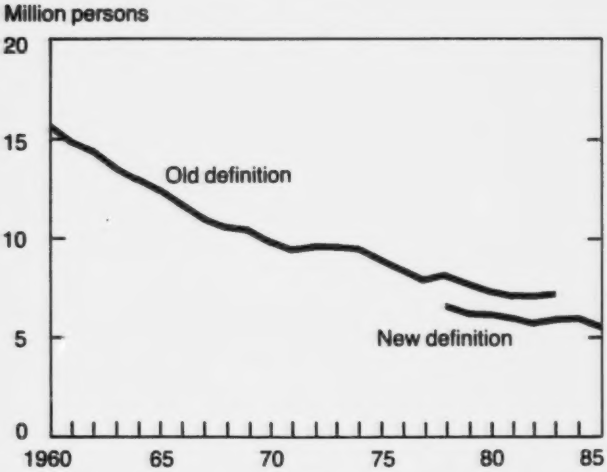
1985 preliminary, 1986 forecast. Excludes operator households. Data as of December

Based on *Farm Sector Financial Problems: Another Perspective*, AIB-499.
U.S. Department of Agriculture, Economic Research Service

Chart 1

Farm Population

About 5.4 million people lived on farms in 1985, down from 5.8 million in 1984. About 1 of every 45 persons, or 2.2 percent of the U.S. total, lived on a farm in 1985.

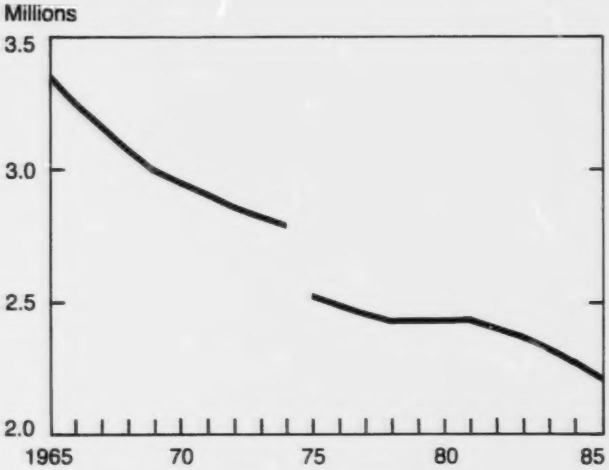


The farm population includes all people living on rural farms. For farm definitions, see 1974 Census of Agriculture. Source: Bureau of the Census.

Chart 2

Number of Farms

The number of farms has declined by almost 3 percent in 1986. Since stabilizing in the late 1970's, farm numbers have fallen 10 percent.

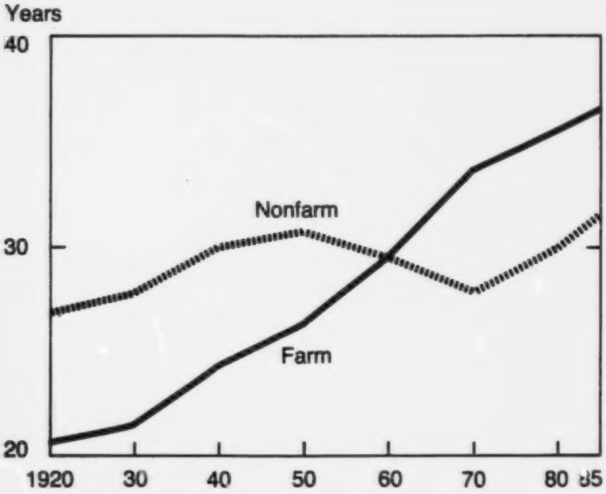


Starting with 1975, a farm is a place as of June 1 that sells $1,000 of agricultural products during the year.

Chart 3

Median Age of Farm and Nonfarm Residents

Because of historic high outmigration of young adults, the farm population has a higher median age (36.5 years in 1985) than the nonfarm population (31.4 years).

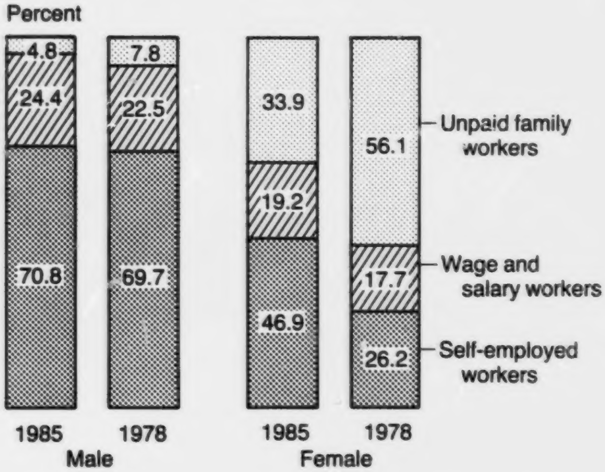


Source: Bureau of the Census.

Chart 4

Agricultural Employment of Farm Residents

Differences in agricultural employment breakdowns of farm men and women are becoming less pronounced. Unpaid work is on the decline among farm women.

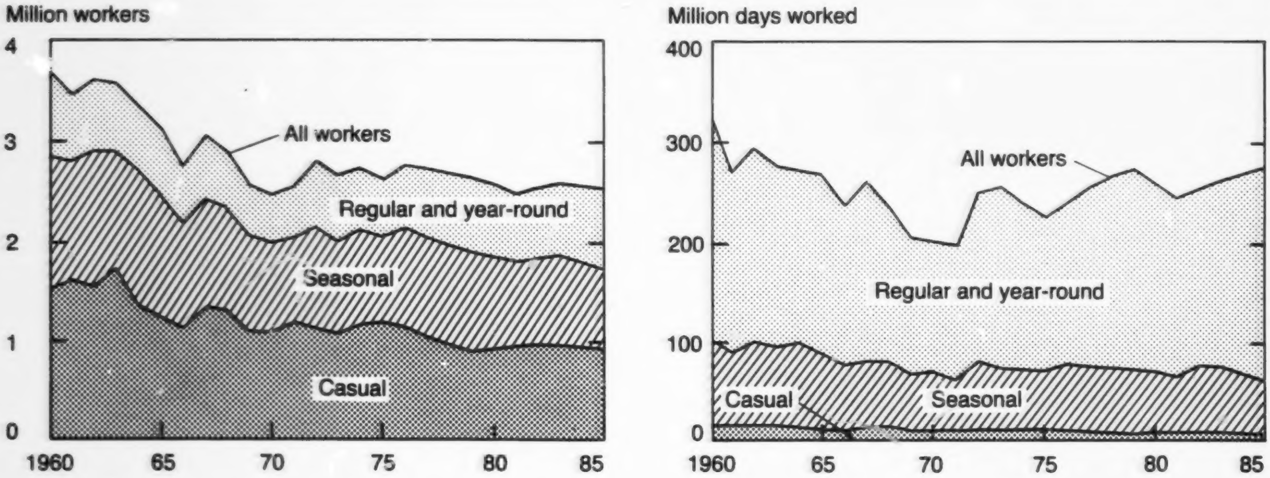


1985 data relate to employed persons 15 years and over. 1978 data relate to employed persons 14 years and over. Source: Bureau of the Census.

Chart 5

Hired Farmworkers and Days Worked

The number of hired farmworkers stabilized during the 1970's after a long decline, while days of farmwork rose. Sixty-eight percent of hired farmworkers are casual and seasonal and do farmwork less than 150 days per year. Remaining workers accounted for 77 percent of the days worked on farms.

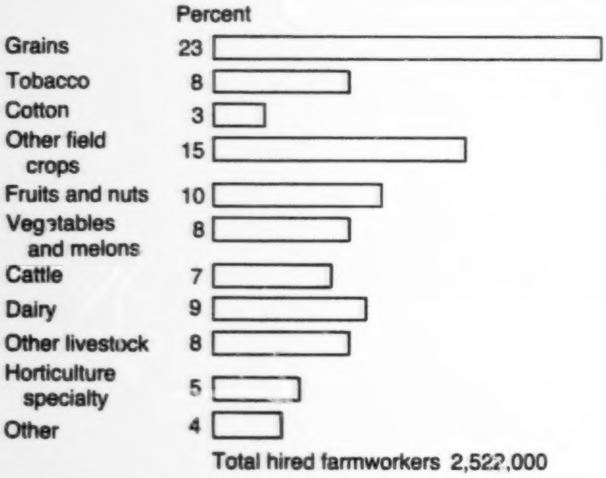


1985 preliminary. Data for 1978, 1980, 1982, and 1984 are interpolated—data not available. Regular and year-round worked on farms 150 or more days a year, seasonal worked 25-149 days, and casual worked less than 25 days. Source: Agricultural Work Force Survey, periodic.

Chart 6

Major Crop or Livestock Activity of Hired Farmworkers

About three-quarters of hired farmworkers worked in crops on their longest farm job during 1985. More workers worked in grain production than any other commodity.

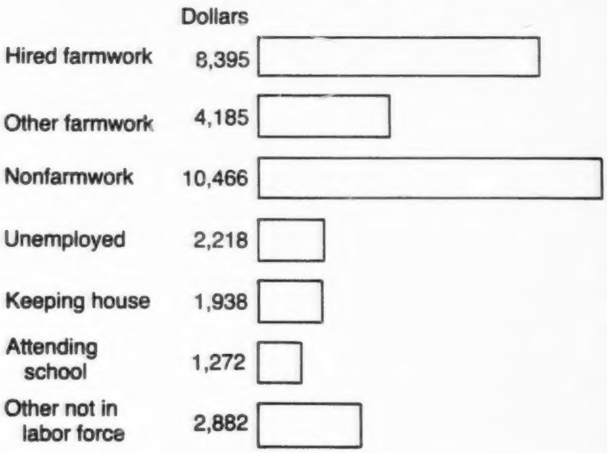


1985 preliminary. Based on longest farm job during the year. Source: Agricultural Work Force Survey.

Chart 7

Average Earnings of Hired Farmworkers by Primary Labor Force Activity

Annual earnings of hired farmworkers vary by their primary labor force activity, but earnings are less than the average for nonfarm production workers at $15,660.



1985 preliminary. Based on person's major labor force activity during the year. Other farmwork includes operating a farm and unpaid labor. Source: Agricultural Work Force Survey.

Chart 8

Components of Net Farm Income

Gross farm income was $166.6 billion in 1985, down 5 percent from 1984. Government payments and noncash income were down 8 and 14 percent, respectively.

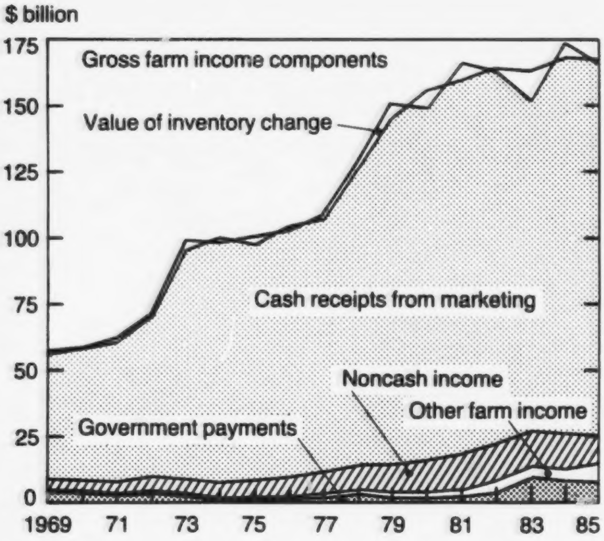
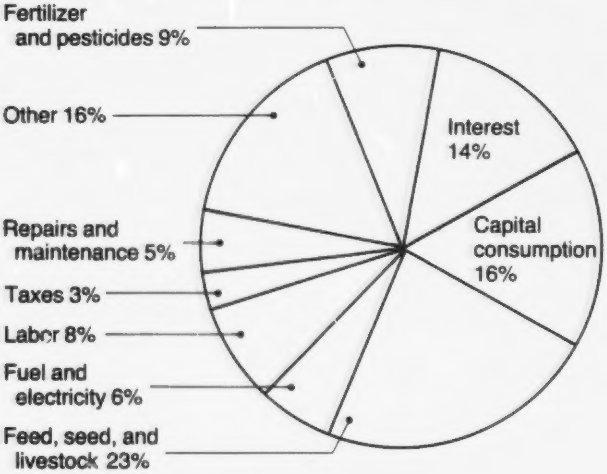


Chart 9

Components of Farm Production Expenses

Capital consumption and interest expenses accounted for smaller shares of total expenses in 1985 than in 1984; feed, fertilizer, and labor components had slightly larger shares.



1985 data. Includes farm households.

Chart 10

Net Farm Income

Net farm income in 1984 was only $1.7 billion less than the high of $34.4 billion in 1973, but fell to $30.5 billion in 1985, a decline of 6.7 percent.

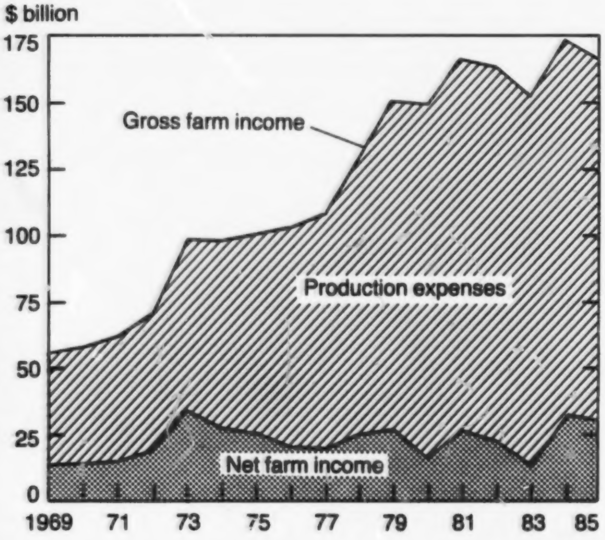
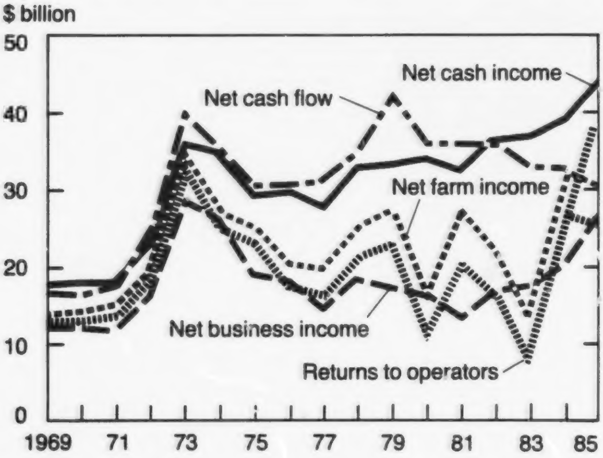


Chart 11

Measures of Farm Income

Net cash flow dropped by 20.7 percent in 1985. Returns to operators fell from $26.9 billion in 1984 to $25.7 billion in 1985, a 4.5-percent drop.

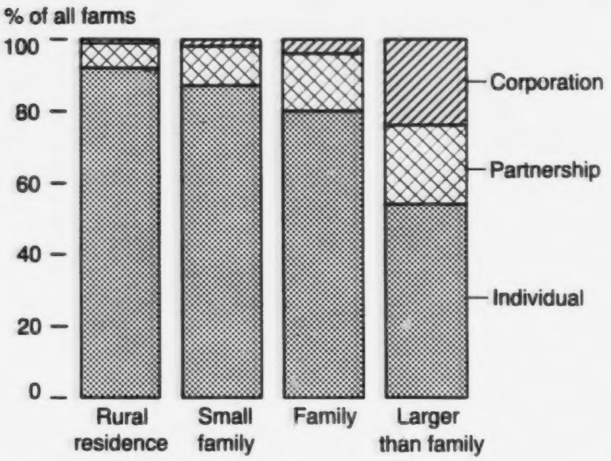


Net cash income excludes household expenses and noncash income and expenses. Net cash flow is net cash income including annual change in debt plus rent paid to landlords, less capital expenditures.

Chart 12

Farm Organization by Size of Farm

Farm size determines organization: As size increases, the proportion of partnerships and corporations rises.

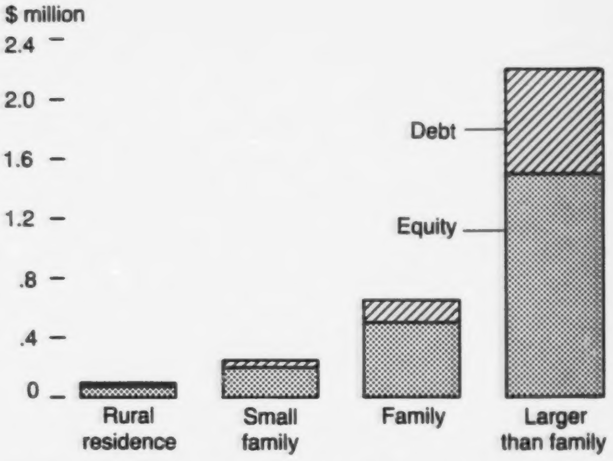


1982 data. Rural residence farms have sales under $10,000 annually; small family farms, $10,000-$39,999; family farms, $40,000-$249,999; larger than family farms, $250,000 and over.

Chart 13

Farm Operator Debt and Equity by Size of Farm

Debt as a proportion of total assets rises with size, from 15 percent for rural residences to 32 percent on the largest farms.

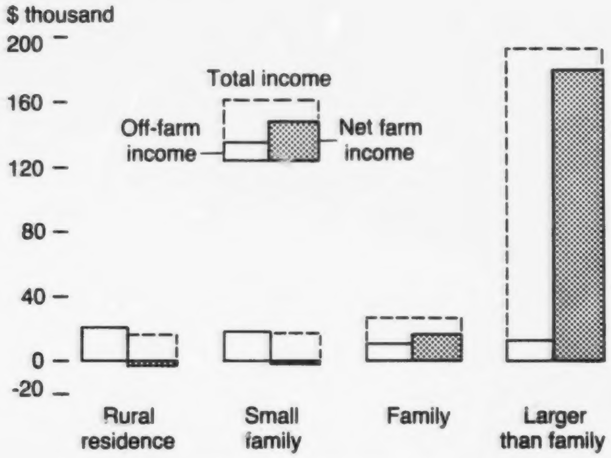


1984 data. Rural residence farms have sales under $10,000 annually; small family farms, $10,000-$39,999; family farms, $40,000-$249,999; larger than family farms, $250,000 and over.

Chart 14

Total Farm Operator Income by Size of Farm

Importance of off-farm income falls as size of farm increases. Off-farm income exceeds net farm income for farms with less than $100,000 in sales.

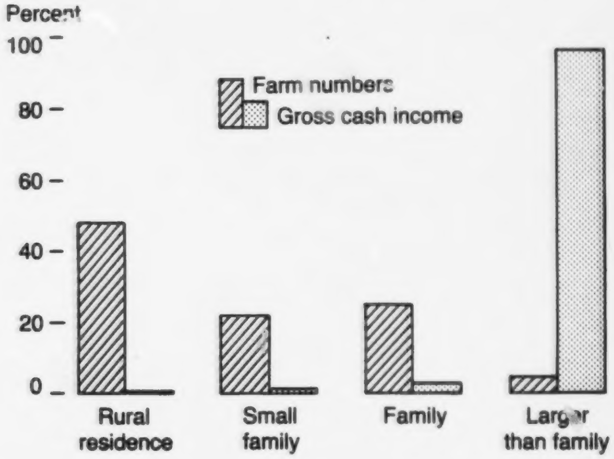


1984 data. Rural residence farms have sales under $10,000 annually; small family farms, $10,000-$39,999; family farms, $40,000-$249,999; larger than family farms, $250,000 and over.

Chart 15

Distribution of Farms and Gross Cash Income by Size of Farm

The largest farms have the largest share of gross cash income—the largest (5 percent of farms) received 97 percent, the smallest (50 percent of farms) took less than 1 percent.

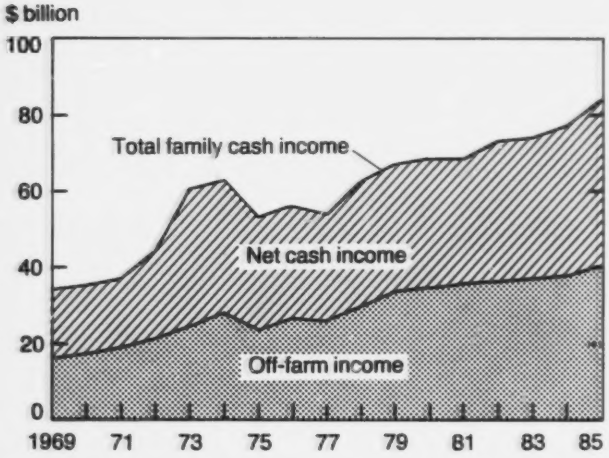


1984 data. Rural residence farms have sales under $10,000 annually; small family farms, $10,000-$39,999; family farms, $40,000-$249,999; larger than family farms, $250,000 and over.

Chart 16

Cash Income of Farm Operator Households

Total family cash income (the sum of net cash income and off-farm income), rose by 9.8 percent in 1985.

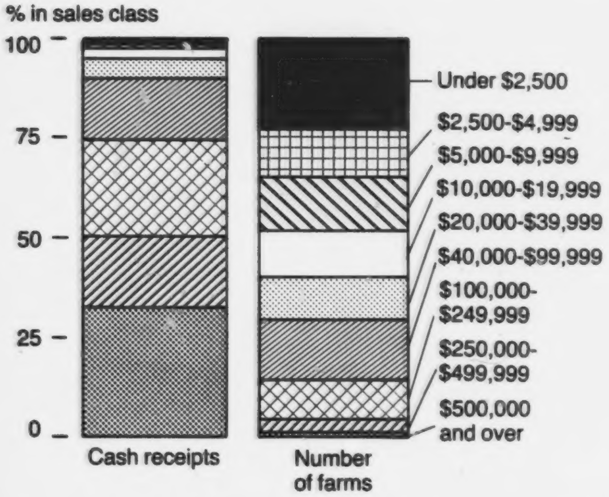


Net cash income includes an adjustment for changes in year-end crop and livestock inventories and represents returns to operator families' labor, capital, and management.

Chart 18

Cash Receipts and Farms by Sales Class

Farms with sales over $100,000 represented 9.9 percent of all farms, but nearly 75 percent of the cash receipts from marketing farm commodities.

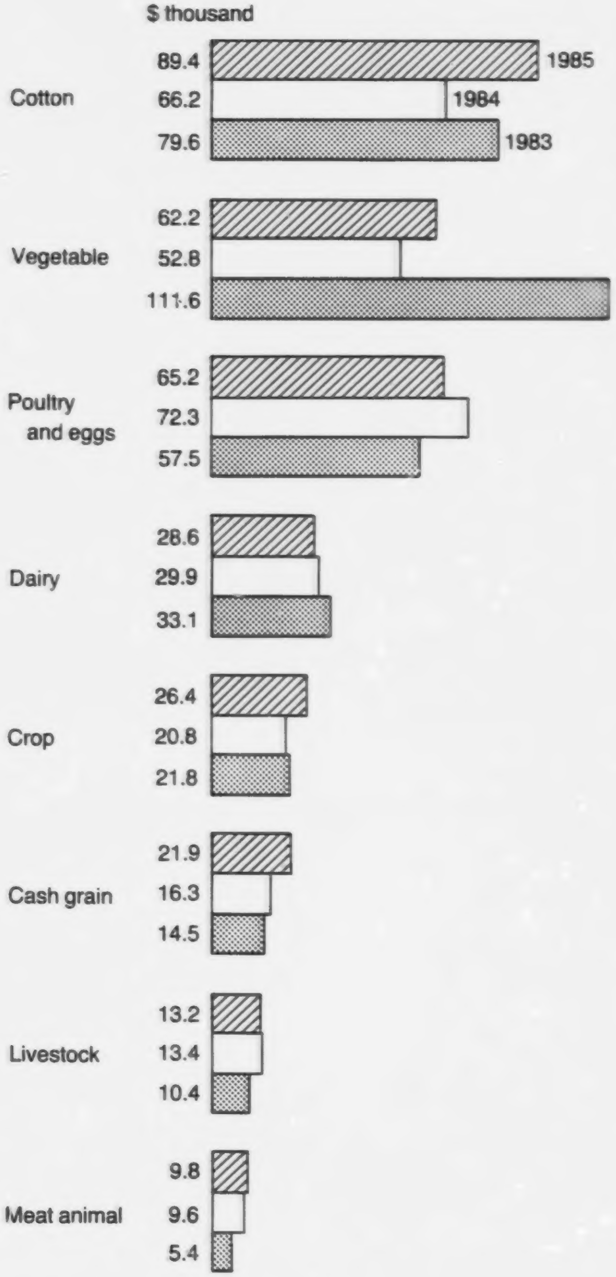


1984 data. Cash receipts from farm marketings including net CCC loans.

Chart 17

Net Cash Distribution of Income by Type of Farm

After rising 6 percent in 1984, net cash income climbed 12 percent to $44 billion in 1985.

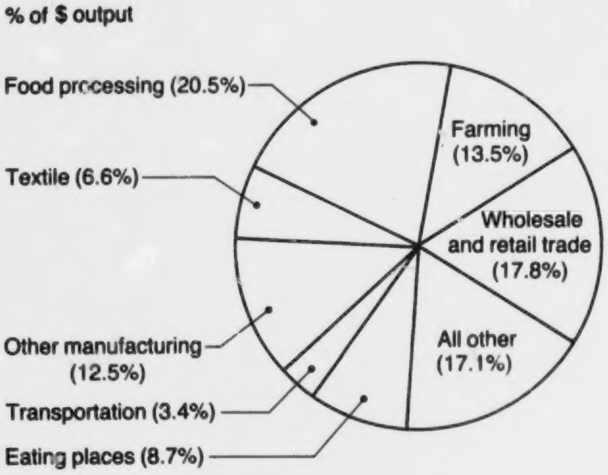


These distributions are per farm averages, not actual observed data.

Chart 19

Total Output by Sectors of the Food and Fiber System

Food processing accounted for 20.5 percent of food and fiber output in 1985; farming contributed 13.5 percent, and wholesale and retail trade contributed 17.8 percent.

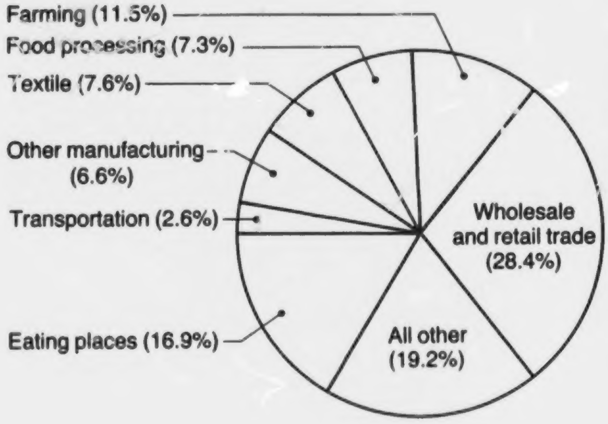


1985 data. Total does not add due to rounding.

Chart 20

Food and Fiber System Employment

The food and fiber system employed 21.4 million full-time equivalent workers in 1985, or 18.5 percent of the total civilian workforce.

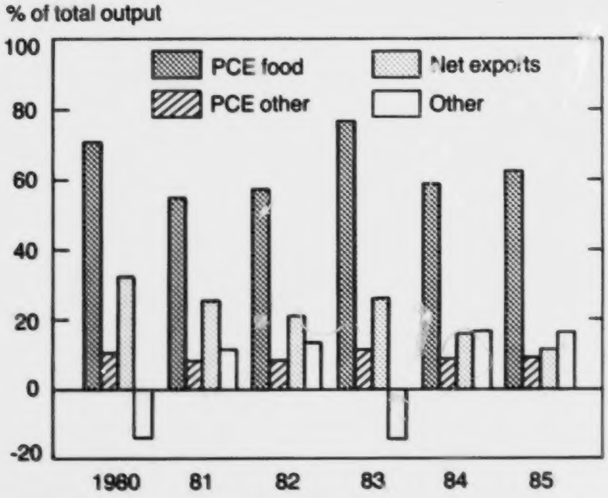


1985 data. Total does not add due to rounding.

Chart 21

Sources of Demand for Crop Output

Personal consumption expenditures for food averaged 64 percent of the final demand for crop output between 1980 and 1985.

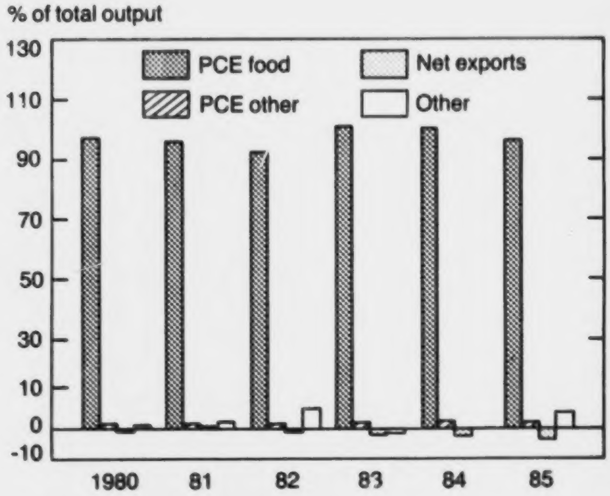


PCE is personal consumption expenditures.

Chart 22

Sources of Demand for Livestock Output

Personal consumption expenditures for food alone account for almost all livestock output in most years.



PCE is personal consumption expenditures.

Chart 23

Gross Farm Product Share of Gross National Product

With the export boom of the 1970's past, the farm sector has resumed its historical downward trend as a share of the general economy.

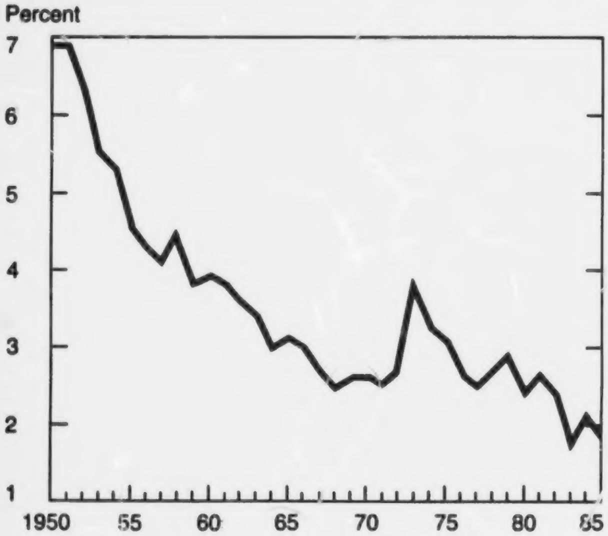


Chart 24

Food and Fiber System Employment As a Percentage of Total Civilian Employment

With stable food and clothing demands and expansion in newer industries, the percentage of the workforce in the food and fiber system declines.

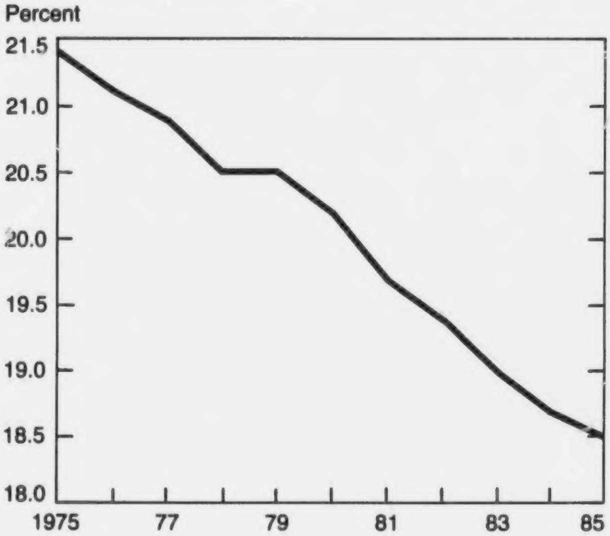
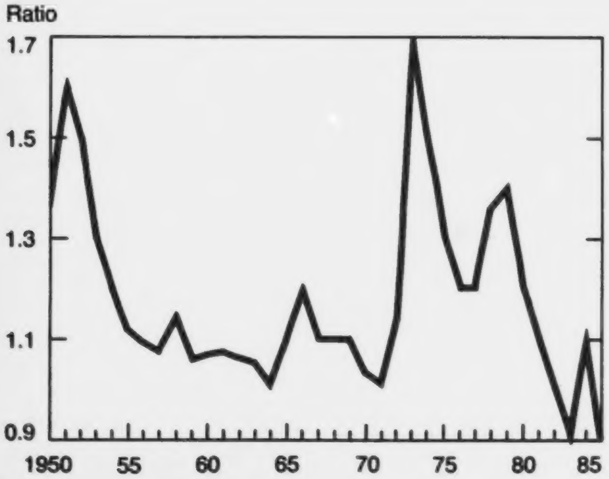


Chart 25

Ratio of Implicit Price Deflators for Gross Farm Product and Gross National Product

Higher per-unit returns to farm resources than to nonfarm resources (a ratio over 1) encourage commitment of resources such as land and machinery to farming.



An implicit price deflator measures the effect of changes in output and input prices on returns to land, labor, and capital.

Chart 26

Consumer Prices and Prices Received by Farmers

Rapidly rising prices for farm goods during the 1970's contributed to higher consumer prices, but farm prices have had a moderating influence on consumer prices since 1980.

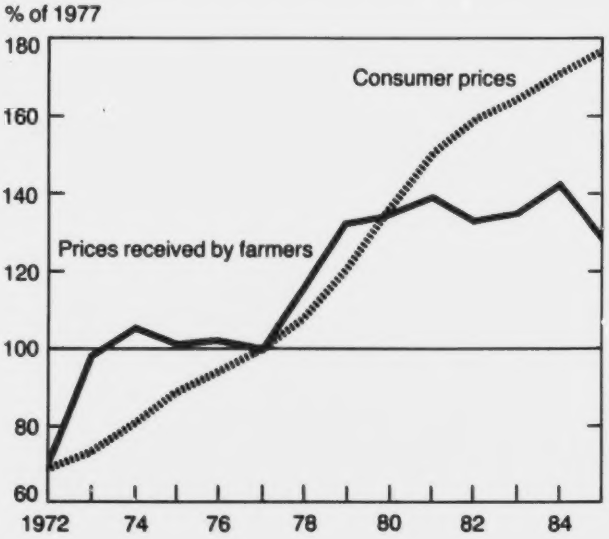
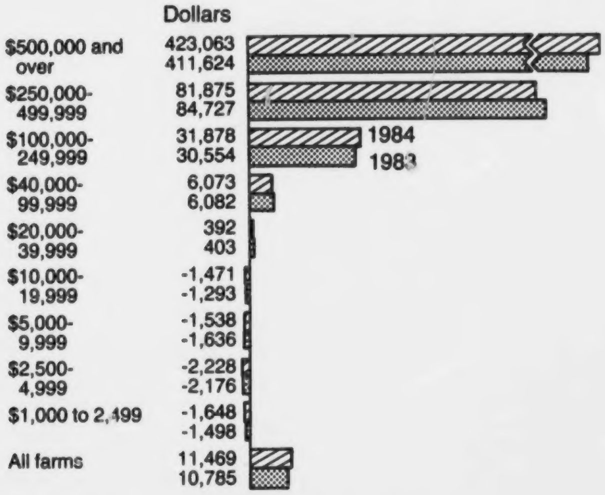


Chart 27

Average Net Farm Income by Sales Class

Farms with gross sales under $20,000 had, on average, negative net farm income before inventory adjustment.

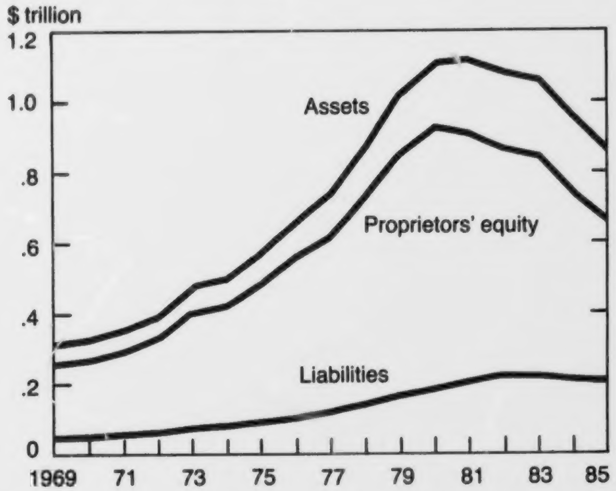


Net income before adjustment for inventory change.

Chart 28

U.S. Farm Balance Sheet

Farm equity has fallen by $264 billion, or 29 percent, from its peak value in December 1980, as the continuing decline in farmland prices drove the value down in 1985.

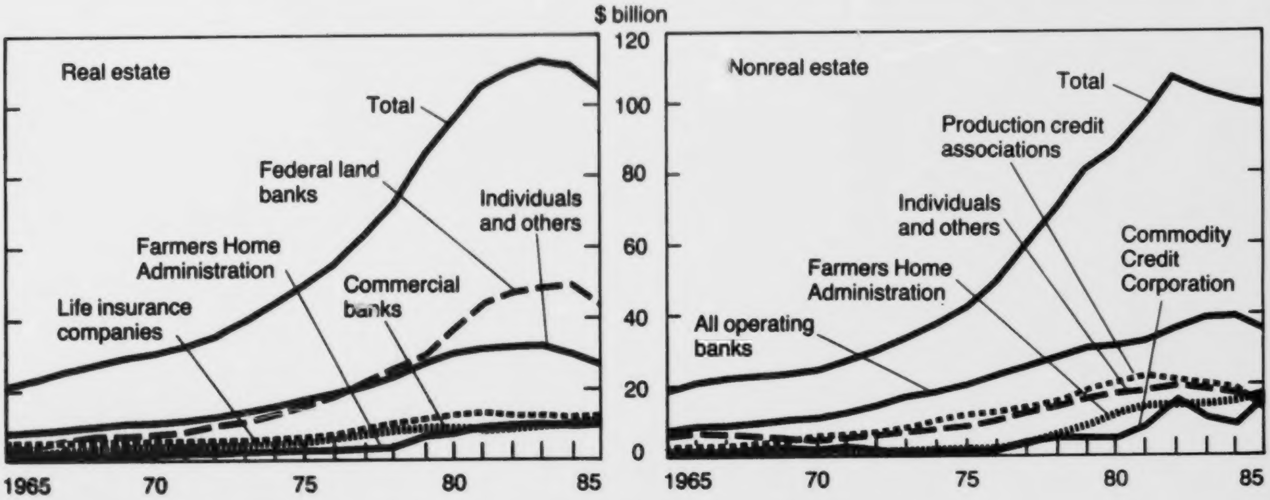


1985 preliminary. Data as of December 31. Includes farm households.

Chart 29

Who Holds the Farm Debt

Federal land banks and individuals and others are the largest sources of farm real estate loans. Many individuals who provided loans to farm buyers are finding that those buyers cannot make the loan payments. Banks are the largest source of nonreal estate loans.

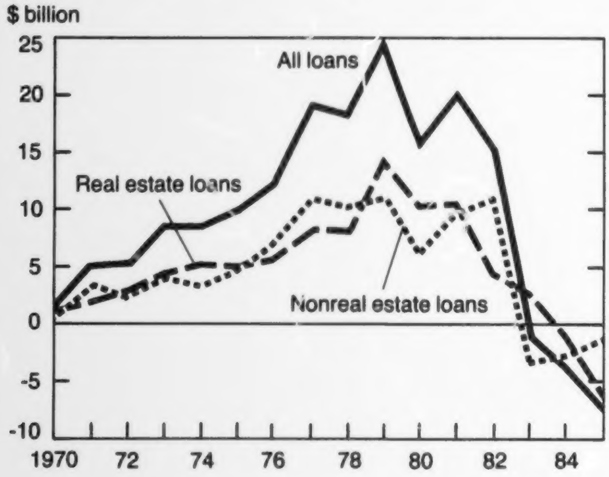


1985 preliminary. Production credit associations include Federal Intermediate Credit Bank loans to other financial institutions.

Chart 30

Annual Change in Farm Debt

Both real estate and nonreal estate farm loans outstanding decreased during 1985. The reduction in farm debt reflects farmers' attempts to improve cash flow.

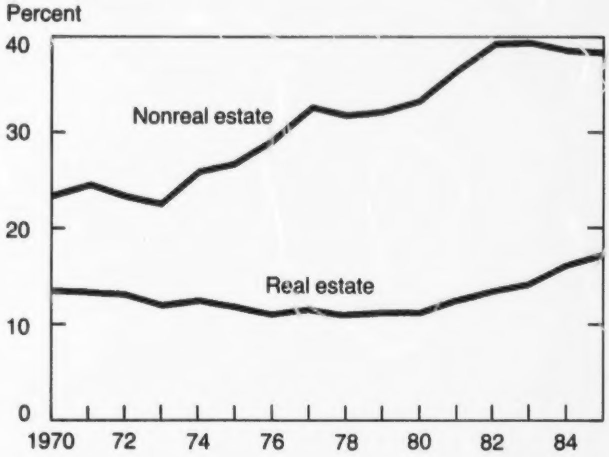


1985 preliminary. Difference between debt outstanding at beginning and end of year. Includes Commodity Credit Corporation loans.

Chart 31

Farm Debt as Percentage of Assets

The debt-to-asset ratio is one measure of the risk involved in loaning funds to the farm sector. The real estate debt-to-asset ratio increased during 1985.

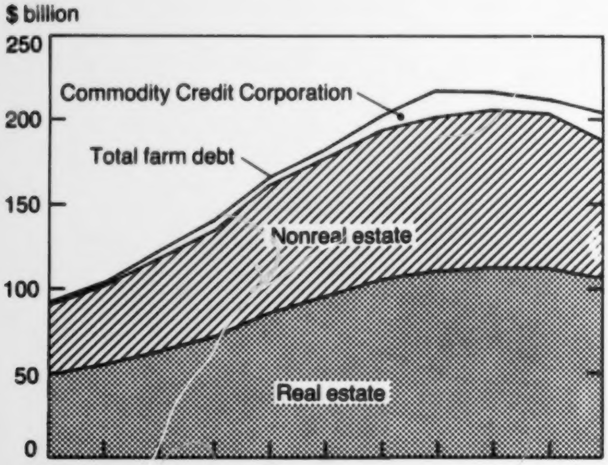


1985 preliminary. Debt is shown as percentage of real estate debt to real estate assets and percentage of nonreal estate debt to nonreal estate assets. Data as of December 31.

Chart 32

Farm Debt

Farmers retired $7.5 billion in farm debt in 1985, the third straight year of decline. Commodity Credit Corporation loans rose 95 percent; nonreal estate debt fell $9.5 billion.

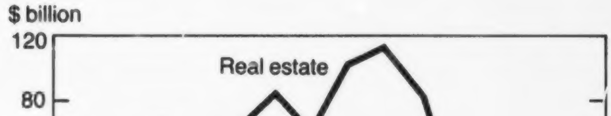


1985 preliminary. Farm loans outstanding December 31.

Chart 33

Capital Gains

Capital losses on farm real estate eased slightly from 1984. Farmland capital losses total $219 billion since 1981. Outstanding loans exceed farmland value in many cases.

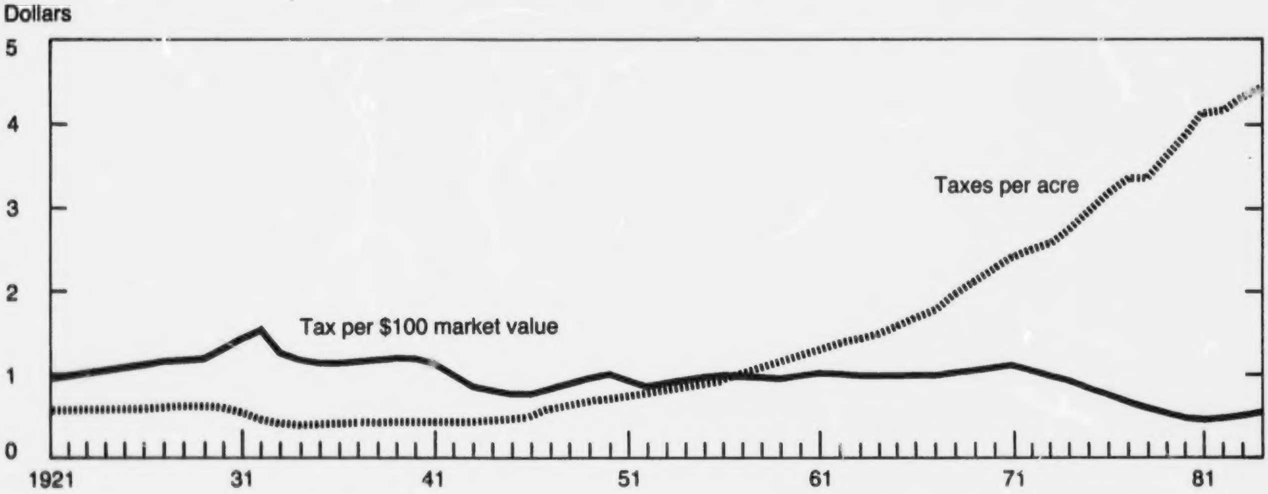


Changes in farm real estate values less net capital investments, mostly unrealized. Other physical assets include machinery and motor vehicles, livestock and poultry, and crops stored on farms.

Chart 34

Farm Real Estate Taxes

The average tax levy per acre of privately owned farmland rose from $4.14 in 1982 to $4.40 in 1984. The effective tax rate was 47 cents per $100 of farmland value in 1982 (the lowest rate in 60 years), but rose to 53 cents per $100 in 1984.

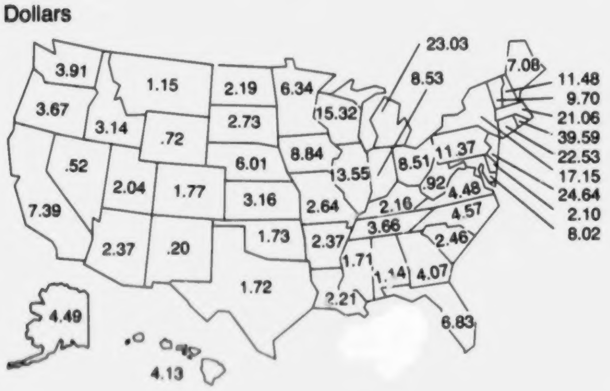


Includes Alaska and Hawaii beginning in 1960.

Chart 35

Farm Real Estate Taxes per Acre

In 1983, the estimated average farm real estate tax per acre ranged from 20 cents in New Mexico to $39.59 in Rhode Island.


Dollars
3.91
1.15
2.19
6.34
3.67
3.14
.72
2.73
15.32
23.03
8.53
7.08
11.48
9.70
21.06
39.59
22.53
17.15
24.64
2.10
8.02
.52
2.04
1.77
6.01
8.84
13.55
8.51
11.37
.92
4.48
7.39
3.16
2.64
2.16
4.57
2.37
.20
1.73
2.37
3.66
2.46
1.72
1.71
1.14
4.07
2.21
6.83
4.49
4.13

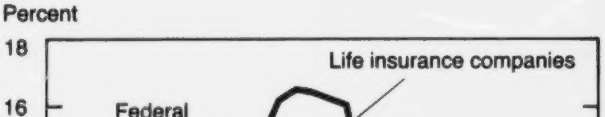
Average, 50 States: $4.32

1983 revised.

Chart 36

Interest Rates on Farm Real Estate Loans

Interest rates charged by Federal land banks have been low relative to their cost of funds, suggesting potential cash flow difficulties for the Farm Credit System in the future.

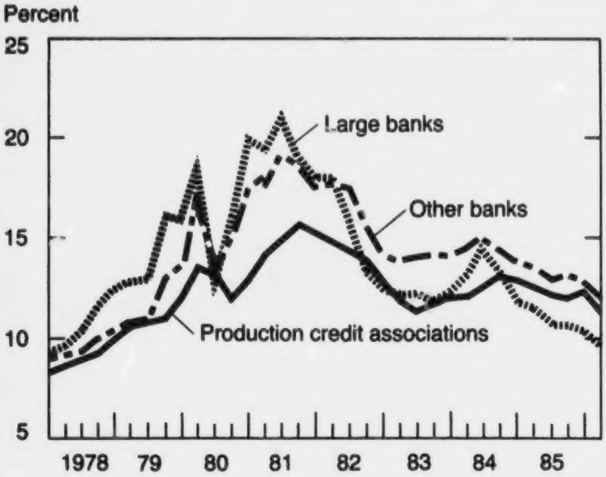


Federal land bank rates exclude new loan fees and charges for the stock borrowers are required to buy.

Chart 37

Interest Rates on Farm Nonreal Estate Loans

Interest rates charged by large banks have declined to less than 10 percent. Smaller agricultural bank rates are nearer 12 percent, due to their higher number of problem loans.

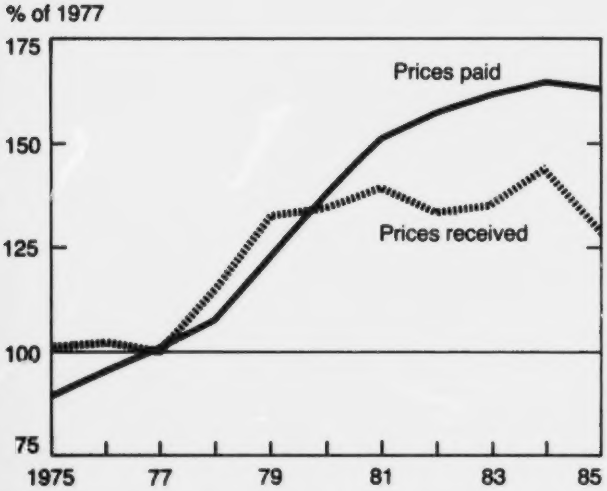


Rates on new PCA loans include service fees. Bank data are from surveys made by the Federal Reserve System.

Chart 39

Prices Received and Paid by Farmers

Prices received fell considerably in 1985, due to lower crop prices. Prices paid also fell due to lower production expenses including interest payments and feed costs.



Prices paid includes commodities, services, interest, taxes, and wage rates.

Chart 38

Prices Received by Farmers for Major Commodities

Major commodities generally received lower prices in 1985 than in 1984. On average, farm products were off 10 percent.

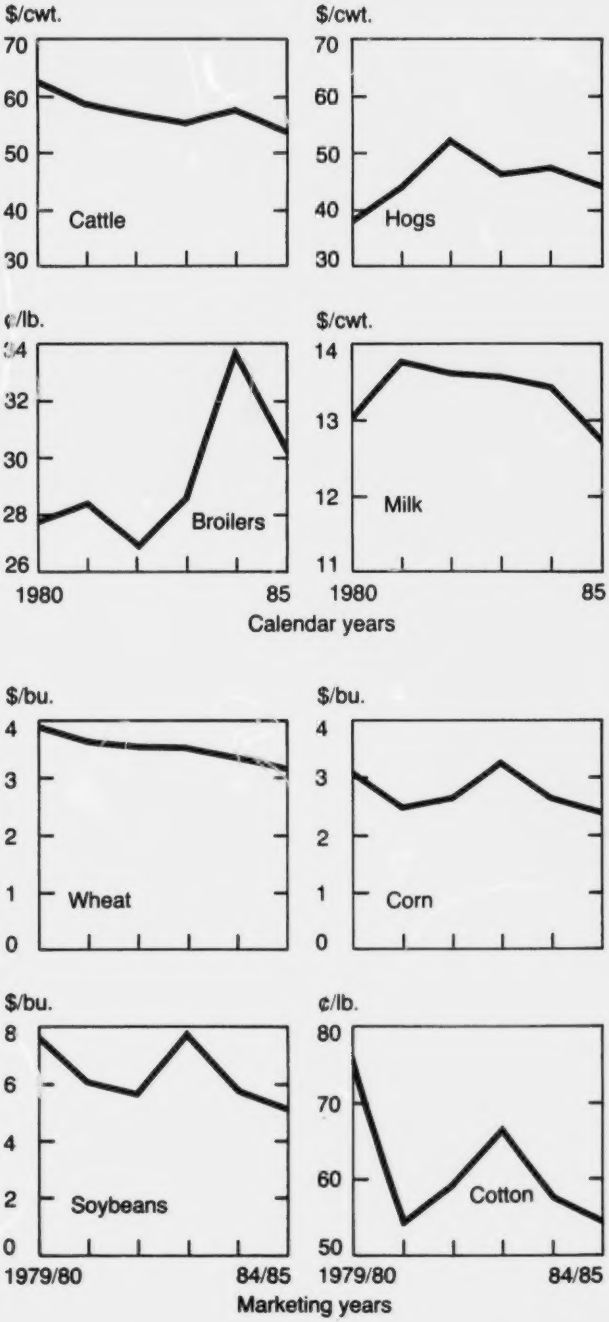
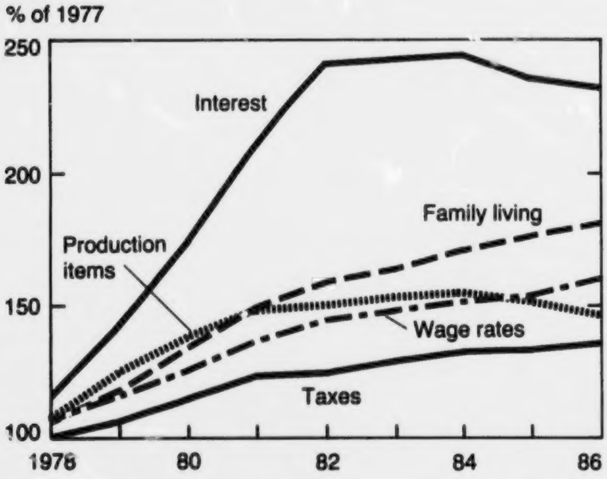


Chart 40

Prices Farmers Pay

Lower prices paid by farmers for interest and production items more than offset higher wage rates and family living expenses.

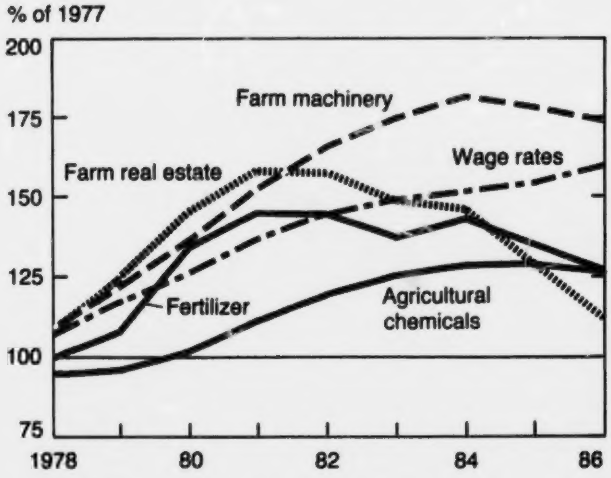


1985 preliminary, 1986 projected. Interest is that payable per acre on farm real estate debt. Taxes are those payable per acre on farm real estate.

Chart 41

Prices of Selected Farm Inputs

Farm real estate, farm machinery, agricultural chemicals, and fertilizer should drop 12, 2, 2, and 7 percent, respectively, while wage rates will rise about 4 percent in 1986.



1985 preliminary, 1986 projected. Farm machinery includes tractors and self-propelled machinery.

Chart 42

Farm Machinery Expenditures

Domestic demand for farm machinery has fallen as the farm economy weakened. Farmers spent 70¢ on repairs for each $1 on purchases in 1985, about twice as much as in the 1970s.

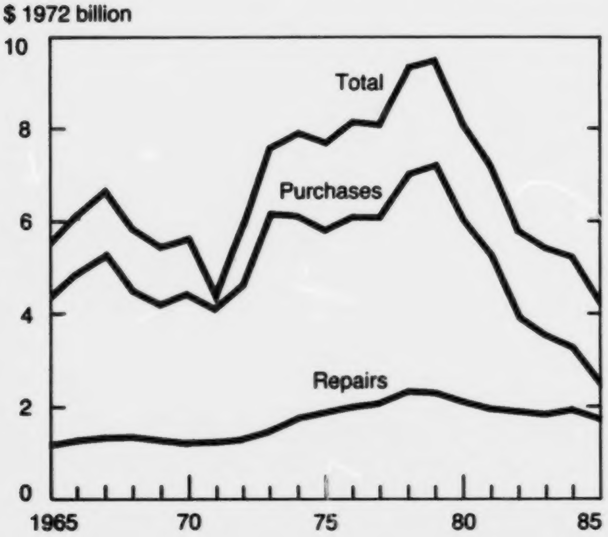
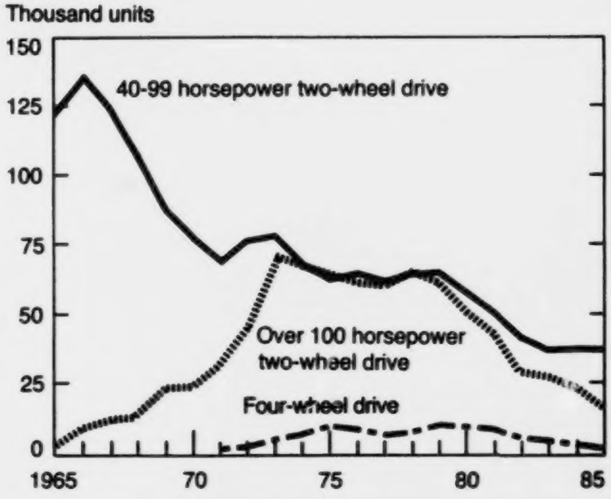


Chart 43

Farm Wheel Tractor Unit Sales

The depressed farm economy has lowered annual sales of 40-99 hp two-wheel, over 100 hp two-wheel, and four-wheel drive tractors 42, 72, and 74 percent, respectively, since 1979.

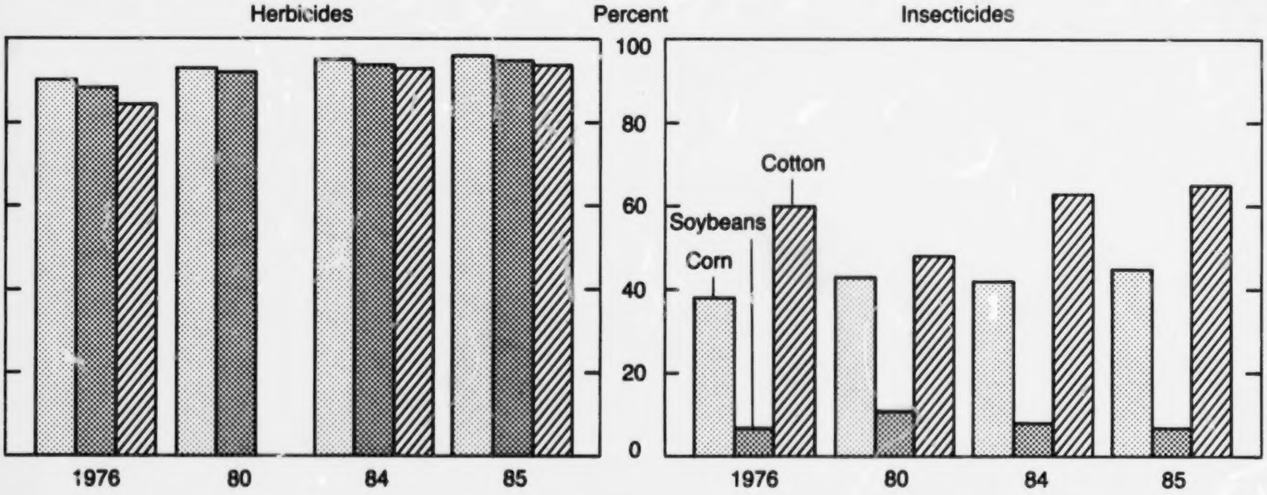


Four-wheel drive tractors were introduced in 1971.

Chart 44

Crop Acres Treated with Pesticides

Between 90-95 percent of the yearly acreage planted to corn, soybeans, and cotton is treated with herbicides. Insecticide use on cotton fell in 1979 when insect populations were at their lowest levels in years. Insecticide use averages 40 percent of the acres in corn and 10 percent in soybeans.



Herbicide data not available for cotton in 1980. Cotton insecticide data for 1979, not 1980.

Chart 45

Cost per Pound of Selected Pesticides

Herbicide prices have generally declined while insecticide prices have increased over the last 5 years. Farmers used 410 million pounds of herbicides, 59 million pounds of insecticides, and 7 million pounds of fungicides in 1986.

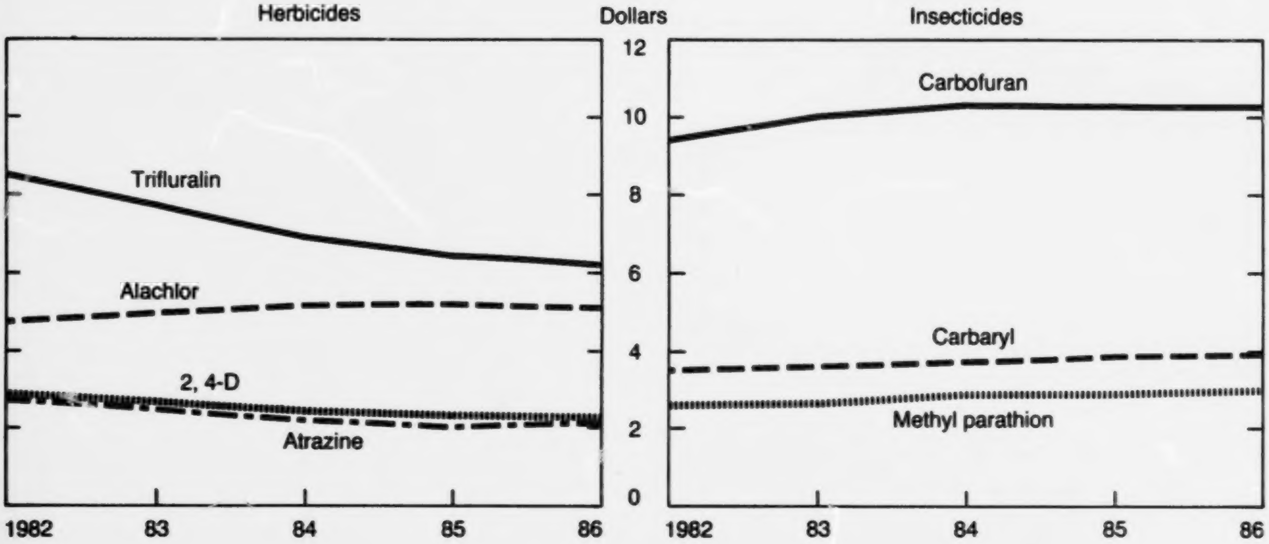


Chart 46

Farm Fertilizer Use

Fertilizer use rose in 1984 as land idled in 1983 was returned to production. Nitrogen use rose as corn acreage and application rates increased in 1985.

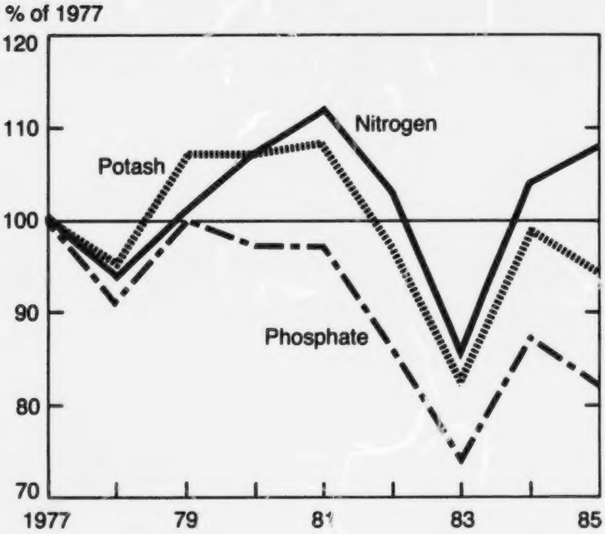


Chart 47

Prices of Fertilizer

Prices of selected fertilizers generally increased until 1981 as use expanded. Plentiful supplies and declining consumption lowered prices in 1985 and 1986.

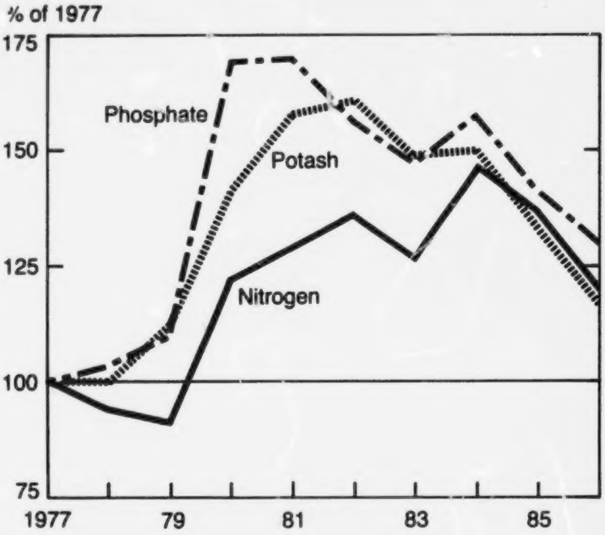
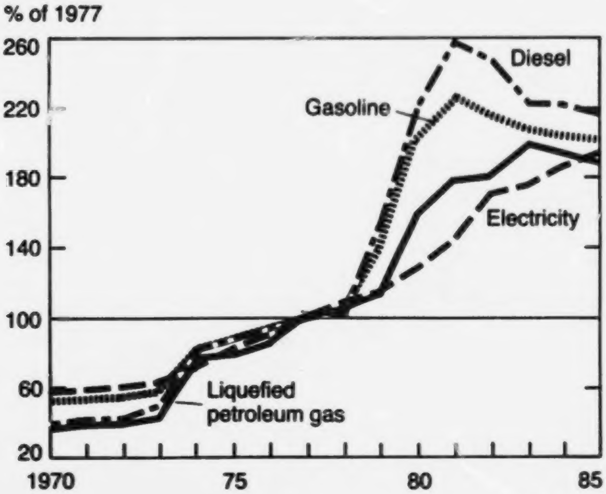


Chart 48

Energy Prices Paid by Farmers

Average bulk gasoline and diesel fuel prices paid by farmers fell 11 and 16 percent, respectively, in 1985 from their 1981 peaks, largely due to the world oil glut.



Prices for gasoline represent bulk delivery prices.

Chart 49

Farm Fuel Use

Onfarm gasoline and diesel fuel use fell 9.5 and 3.3 percent, respectively, in 1985 due to less planted acreage and continued adoption of energy-saving technology.

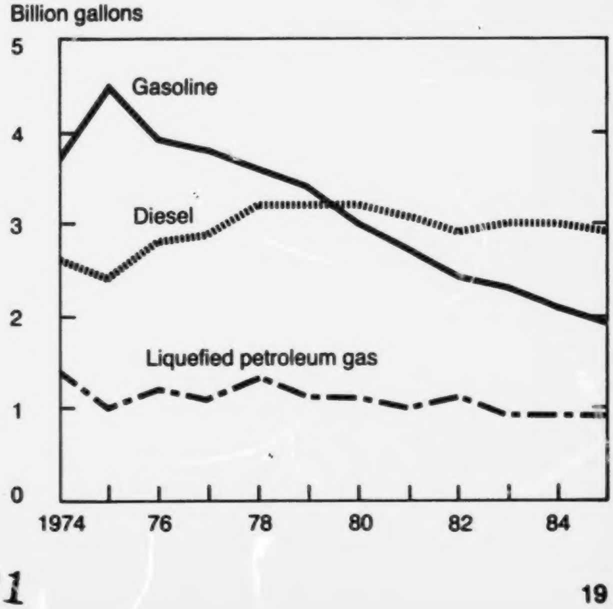
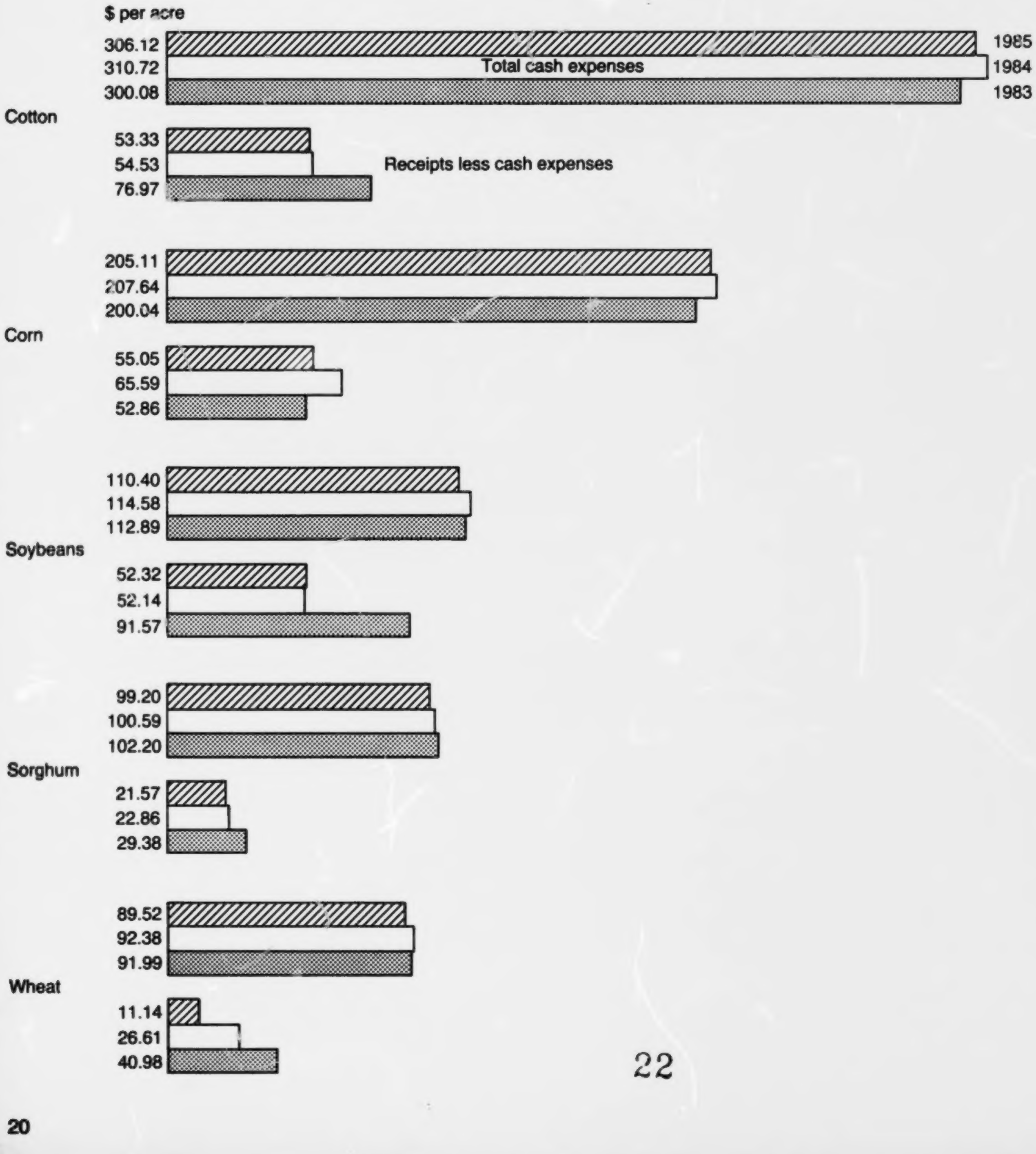


Chart 50

Crop Production Costs and Returns

Input costs were down in 1985. Fuel price decreases accounted for most of the decline, particularly for crops where fertilizer, chemicals, and fuels make up a major portion of variable expenses. These costs did not fall by enough, however, to cover the drop in product prices, so net cash returns also fell.



22

Chart 51

Livestock Production Costs and Returns

As with crop inputs, livestock costs fell in 1985. Fuel price decreases contributed, but more importantly, feed costs fell. The drop in cost for feed, the major livestock input, more than covered decreases in product prices, so net cash returns tended to improve.

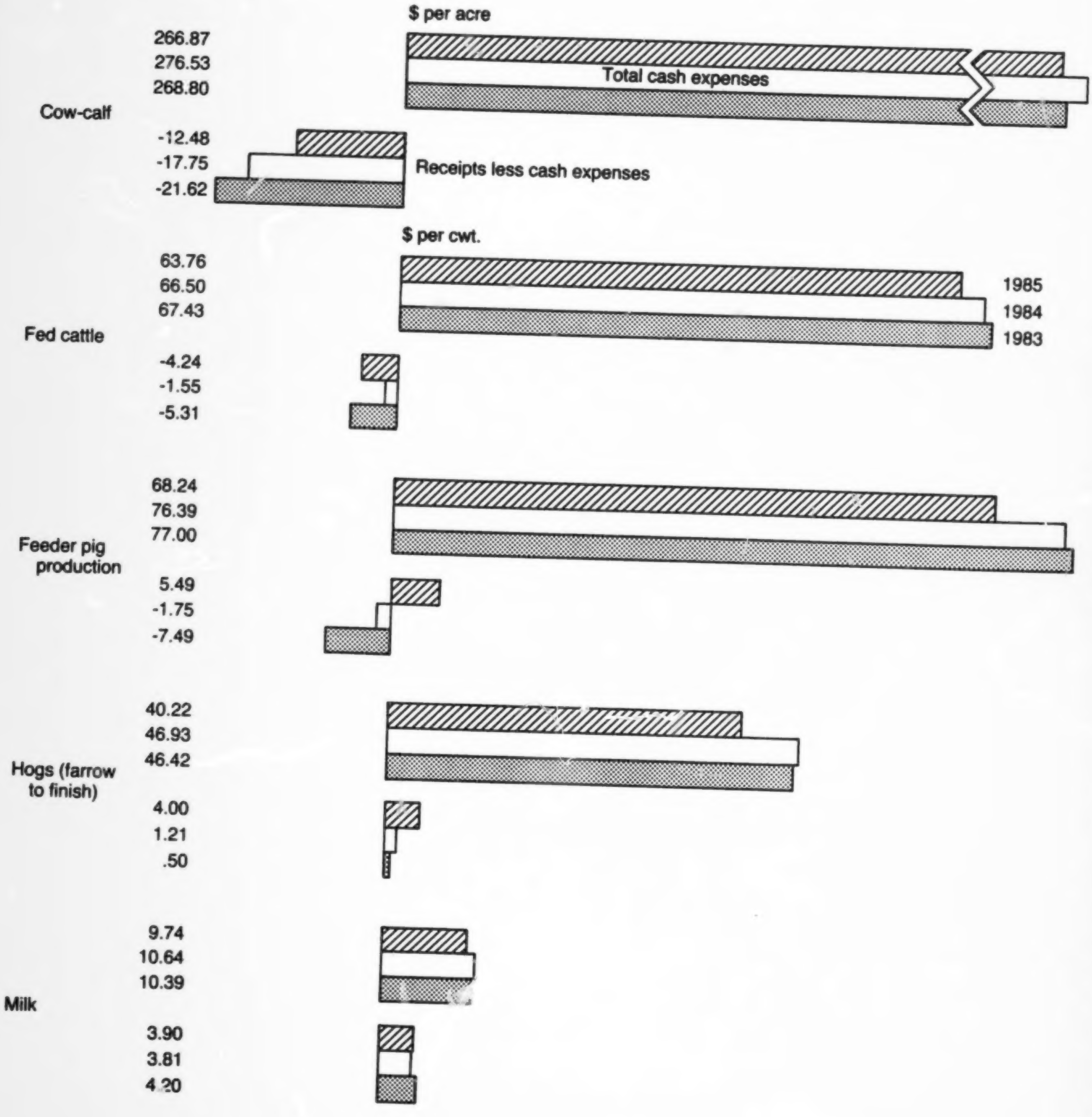
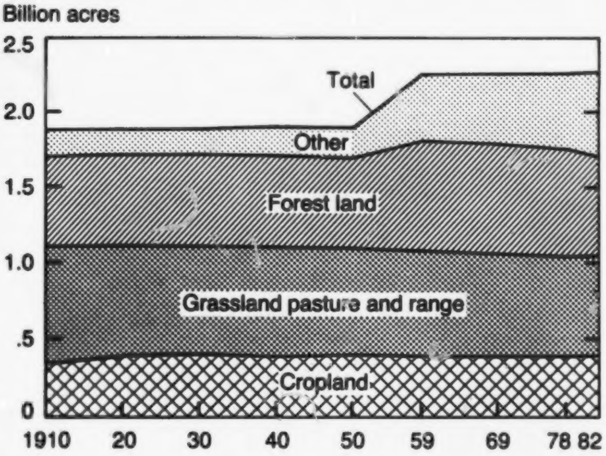


Chart 52

Total U.S. Land Use

Total area rose in 1959 with the addition of Alaska and Hawaii. Declines in grassland and forest land after 1959 were offset by increases in urban areas, parks, and other uses.

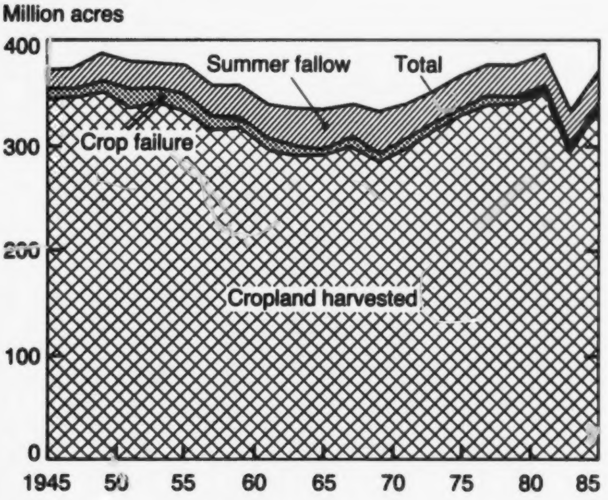


Grassland pasture and range includes cropland used only for pasture. Forest land excludes that reserved for parks and other special uses. Total includes Alaska and Hawaii.

Chart 54

Cropland Used for Crops

Acreage rose in the 1970's with favorable cost/price relationships and reduced diversion programs, dipped in 1983 under the PIK program, then recovered.

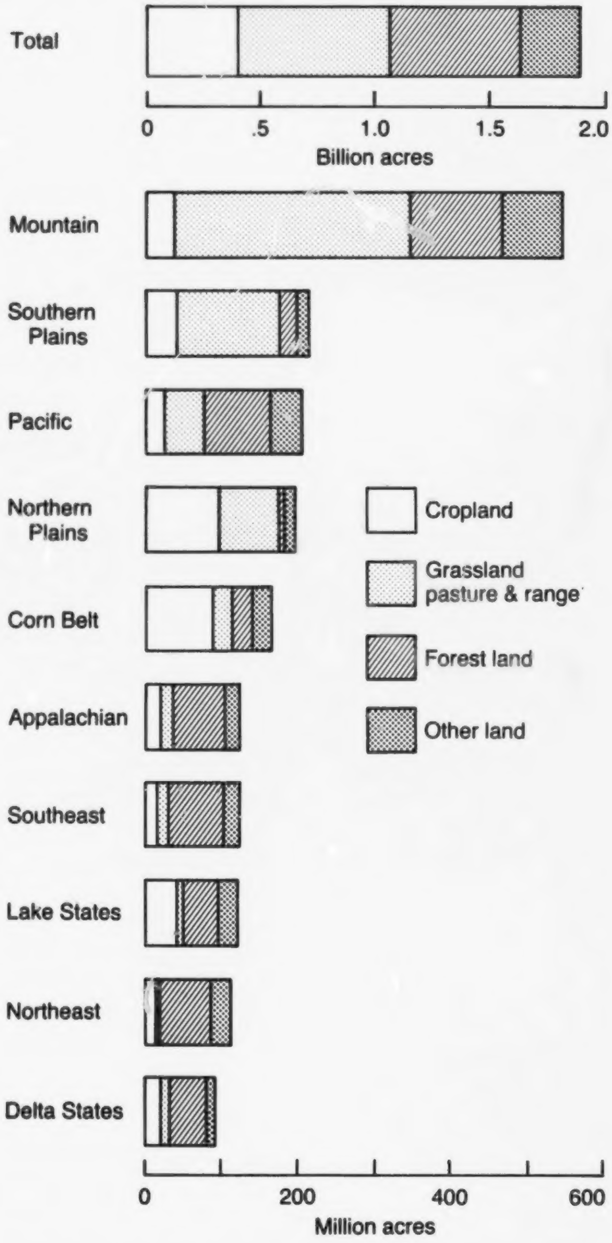


Total excludes cropland used only for pasture and idle cropland.

Chart 53

Major Uses of Land by Region

Cropland was concentrated in the Corn Belt and Northern Plains in 1982, while pasture and range was the principal use in the Mountain and Southern Plains regions.

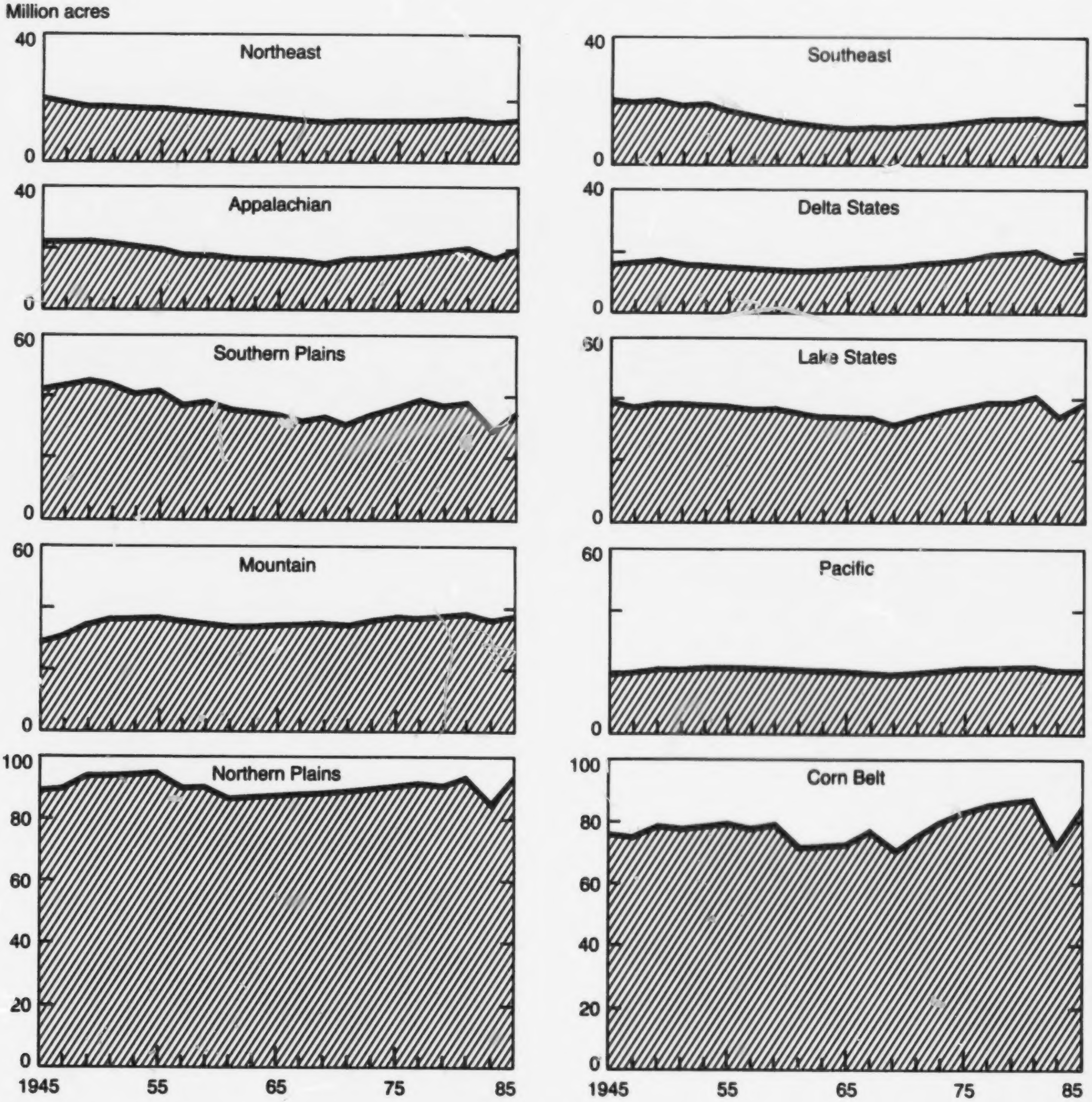


1982 data. Grassland pasture and range includes cropland used only for pasture. Forest land excludes that reserved for parks and other special uses. Total excludes Alaska and Hawaii.

Chart 55

Cropland Used for Crops by Region

Cropland used for crops totaled 372 million acres in both 1945 and 1985, but distribution by region changed. The Corn Belt and Mountain regions saw large increases, while acreage was lower in the Southern Plains and Southeast.

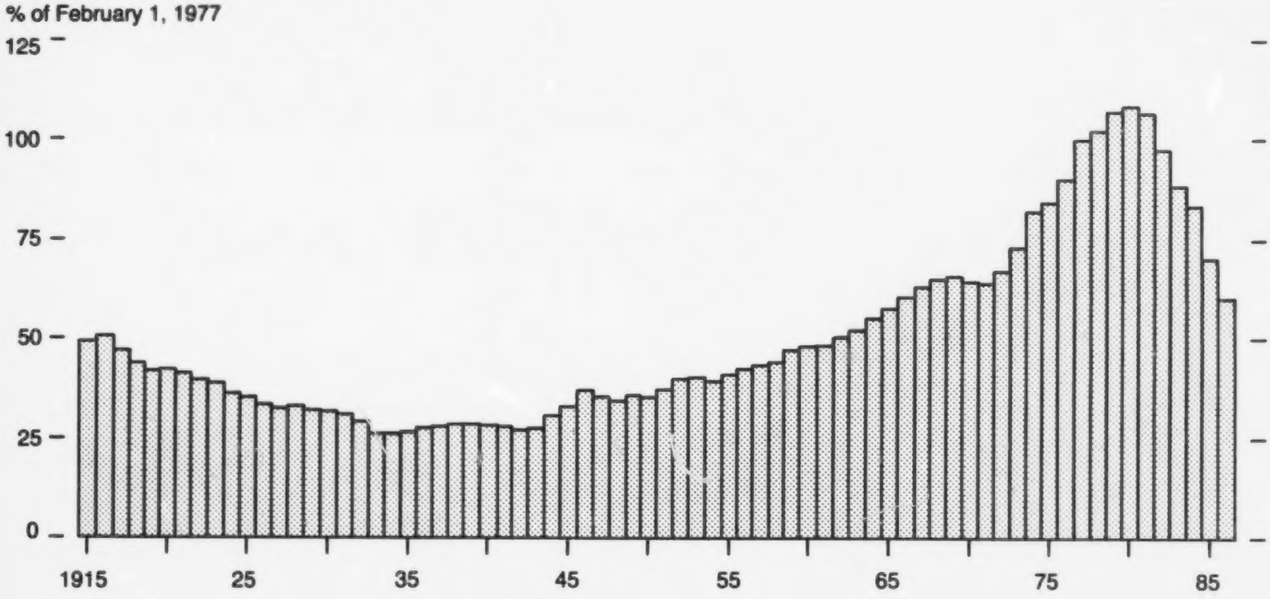


Includes cropland harvested, crop failure, and cultivated summer fallow.

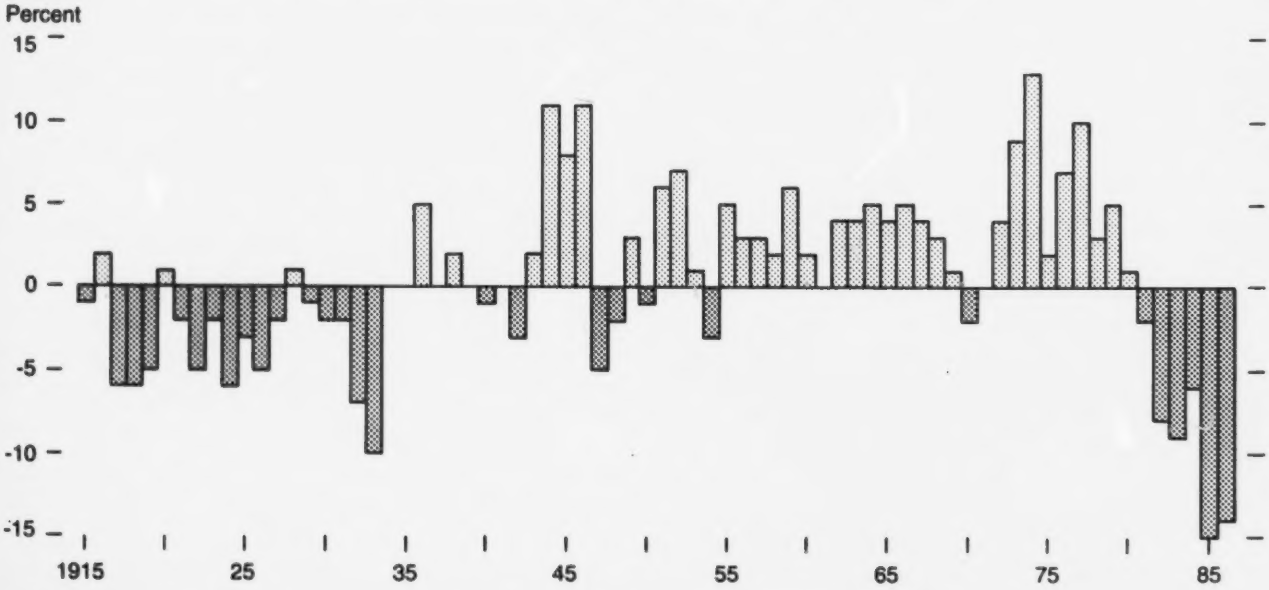
Chart 56

Index of Real Value per Acre of U.S. Farmland

Since February 1980, the real value of U.S. farmland has fallen 44 percent, leaving the index of real value per acre at the 1966 level. The last sustained fall in real values (46 percent) extended from 1915 to 1933. Over the last 2 years, land values have declined 28 percent.



Change in Real Value per Acre from Previous Year



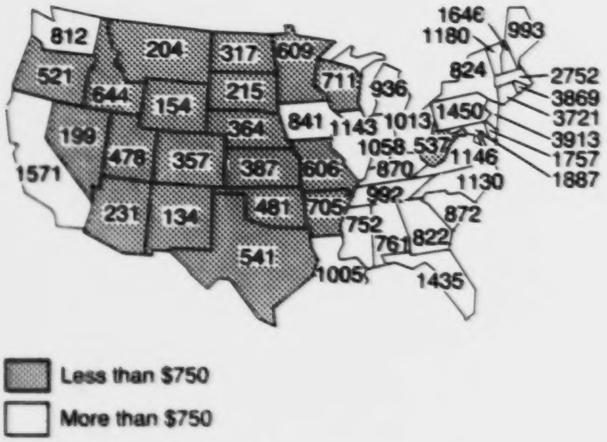
Excludes Alaska and Hawaii. The indices of real farmland value computed by dividing the nominal land value indices by the Consumer Price Index.

Chart 57

Land Values per Acre

Farmland values per acre can depend as much or more on location, population density, and other nonagricultural factors as on productivity for agriculture.

Dollars


812
521
1571
644
199
204
154
478
357
231
134
317
215
364
387
481
541
609
841
606
705
711
1143
936
1013
1058
537
870
992
752
761
1005
1146
1130
872
822
1435
1646
1180
993
824
1450
2752
3869
3721
3913
1757
1887
Less than $750
More than $750

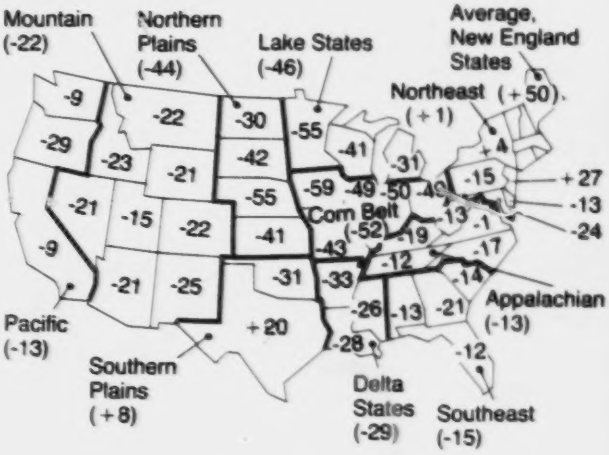
1986 data.

Chart 58

Percentage Change in Land Values, 1981-86

Farmland values peaked in 1981 for most States and regions, but have declined since then. Values in Southern Plains rose 8 percent, largely because of demand for land in Texas.

% change

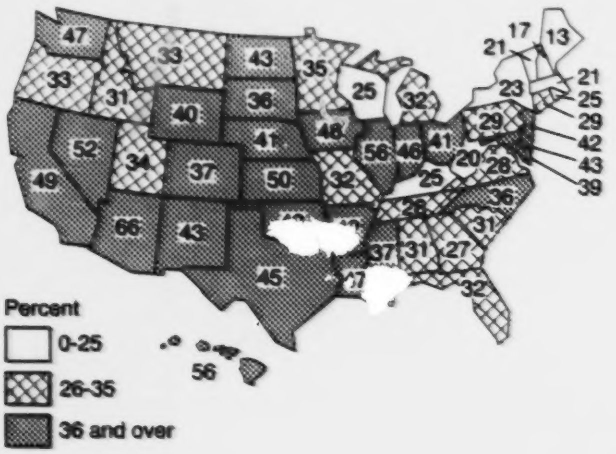

Mountain
(-22)
Northern
Plains
(-44)
Lake States
(-46)
Average,
New England
States
Northeast (+50)
(+1)
-9
-29
-9
-23
-21
-21
-22
-15
-21
-22
-25
-30
-42
-55
-41
-31
+20
-55
-41
-31
-59
-49
-50
-49
Corn Belt
(-52)
-43
-33
-19
-13
-1
-12
-17
-14
-15
+4
+27
-13
-24
-26
-13
-21
-28
-12
Appalachian
(-13)
Pacific
(-13)
Southern
Plains
(+8)
Delta
States
(-29)
Southeast
(-15)

48-State average, -29 percent. Regional averages in parentheses.

Chart 59

Percentage of Farmland Leased from Others

In 1982, an average of 41 percent of all U.S. farmland was leased from others, ranging from 66 percent in Arizona to 13 percent in Maine.


47
33
31
49
52
33
34
66
40
37
43
43
36
41
50
45
35
48
32
25
32
56
46
41
25
28
37
31
27
32
20
28
36
31
29
23
21
17
13
21
25
29
42
43
39
56
Percent
0-25
26-35
36 and over

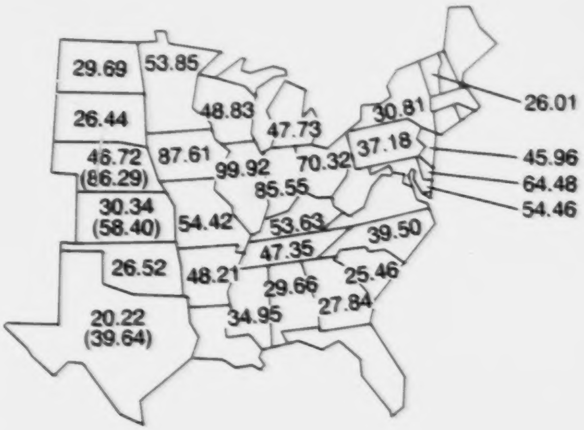
1982 data.

Chart 60

Per Acre Cash Rents for Cropland

Rental rates reflect cropland productivity and competition among renters. Rent for nonirrigated land ranged from $20 per acre in Texas to $100 in Illinois.

Dollars

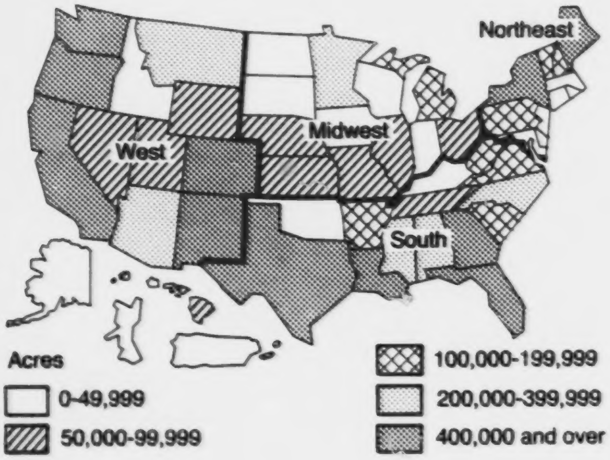

29.69
26.44
46.72
(86.29)
30.34
(58.40)
26.52
20.22
(39.64)
53.85
87.61
54.42
48.21
48.83
99.92
47.73
85.55
70.32
53.63
47.35
29.66
34.95
30.81
37.18
39.50
25.46
27.84
26.01
45.96
64.48
54.46

1986 data. Data not available for Pacific and Mountain States. Rents for irrigated land in the Plains States in parentheses.

Chart 61

Foreign Ownership of Agricultural Land

Foreigners owned 12.1 million acres of U.S. farmland in 1985—less than 0.6 percent of all U.S. land. Forest land accounts for 51 percent of these foreign-held acres.



1985 data.

Chart 62

Organized and Independent Drainage

Of the 110 million acres of U.S. farmland drained, 60 percent still rely on drains installed by townships, counties, and drainage districts.

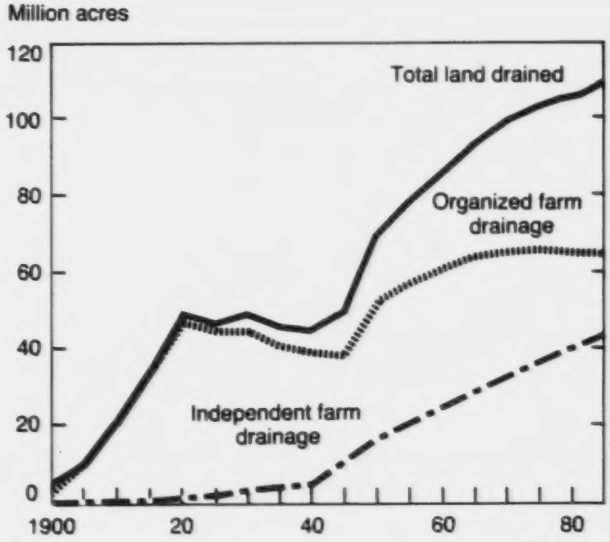


Chart 63

Drainage Methods

Although subsurface drainage requires a greater capital investment, its use has increased due to improved equipment and materials, lower maintenance costs, and minimal land loss.

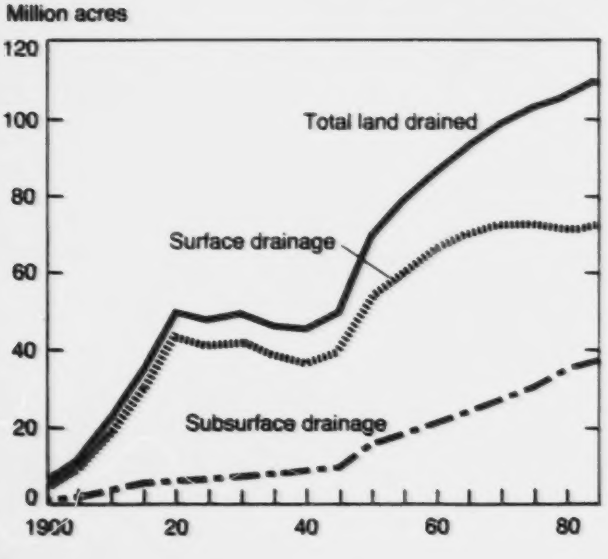
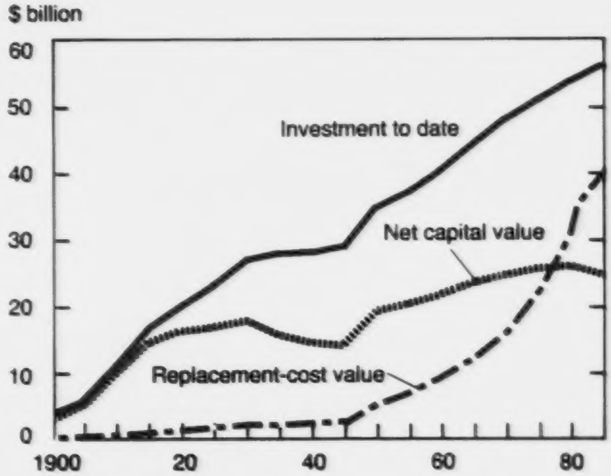


Chart 64

Farm Drainage Investment

The pace of gross as well as net farm drainage investment slowed during 1981-85, as did other types of agricultural investment.

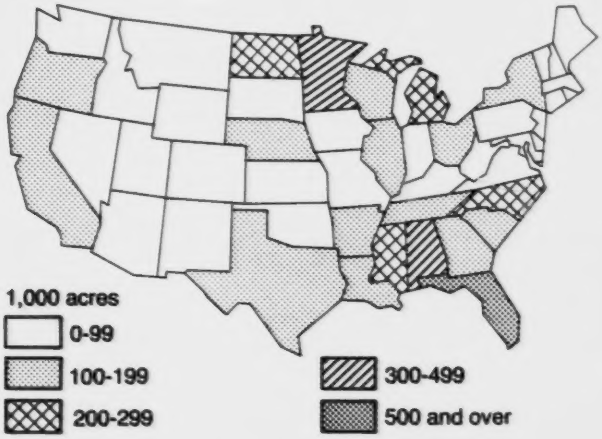


Investment to date and net capital value in constant 1985 dollars. Replacement-cost value in current dollars for years indicated.

Chart 65

Distribution of Wetlands with High or Medium Cropland Potential

Only 5.1 million of the 70.7 million acres of nonfederal wetlands have much potential for cropland conversion. Newly converted land is not eligible for farm program benefits in 1985 legislation.

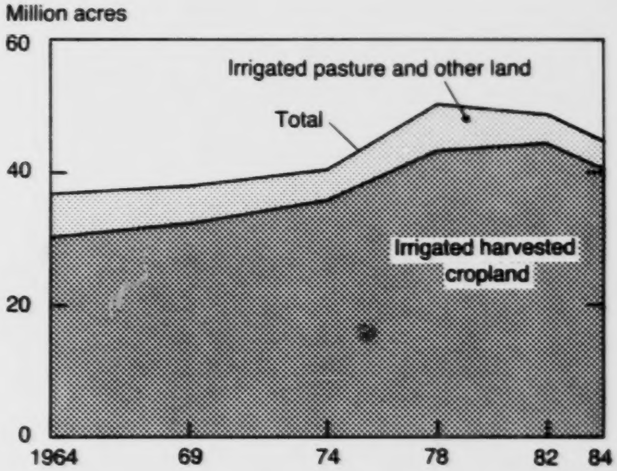

1,000 acres
▭ 0-99
▨ 100-199
▩ 200-299
▧ 300-499
▦ 500 and over

1982 data. Source: 1982 National Resources Inventory, USDA Soil Conservation Service.

Chart 66

Irrigated Farmland

Total irrigated land in the conterminous United States fell from a high of 50.2 million acres in 1978 to 44.7 million in 1984.

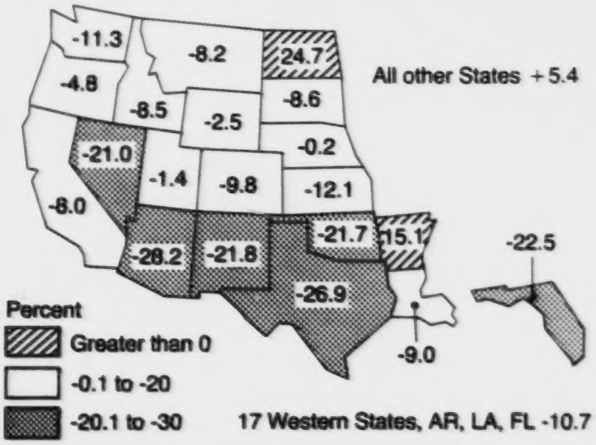


Source: Census of Agriculture 1964-82 and the 1984 Farm and Ranch Irrigation Survey.

Chart 67

Changes in Irrigated Acres, 1979-84

Most of the principal irrigation States saw substantial declines in irrigated acreage during 1979-84, due primarily to less favorable producer cost/price relationships.

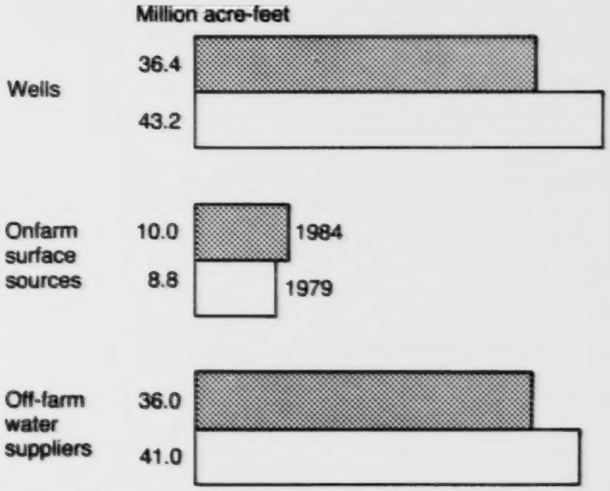

-11.3
-8.2
24.7
All other States +5.4
-4.8
-8.6
-8.5
-2.5
-21.0
-0.2
-1.4
-9.8
-12.1
-8.0
-21.7
15.1
-22.5
-28.2
-21.8
-26.9
-9.0
Percent
▧ Greater than 0
▭ -0.1 to -20
▦ -20.1 to -30
17 Western States, AR, LA, FL -10.7

Excludes Alaska, Hawaii, abnormal, and specialty farms. Source: 1979 and 1984 Farm and Ranch Irrigation Surveys.

Chart 68

Estimated Quantity of Water Applied by Principal Source

The quantity of water applied for irrigation fell from about 93 million acre-feet in 1979 to about 82 million in 1984, mostly because fewer acres were irrigated.

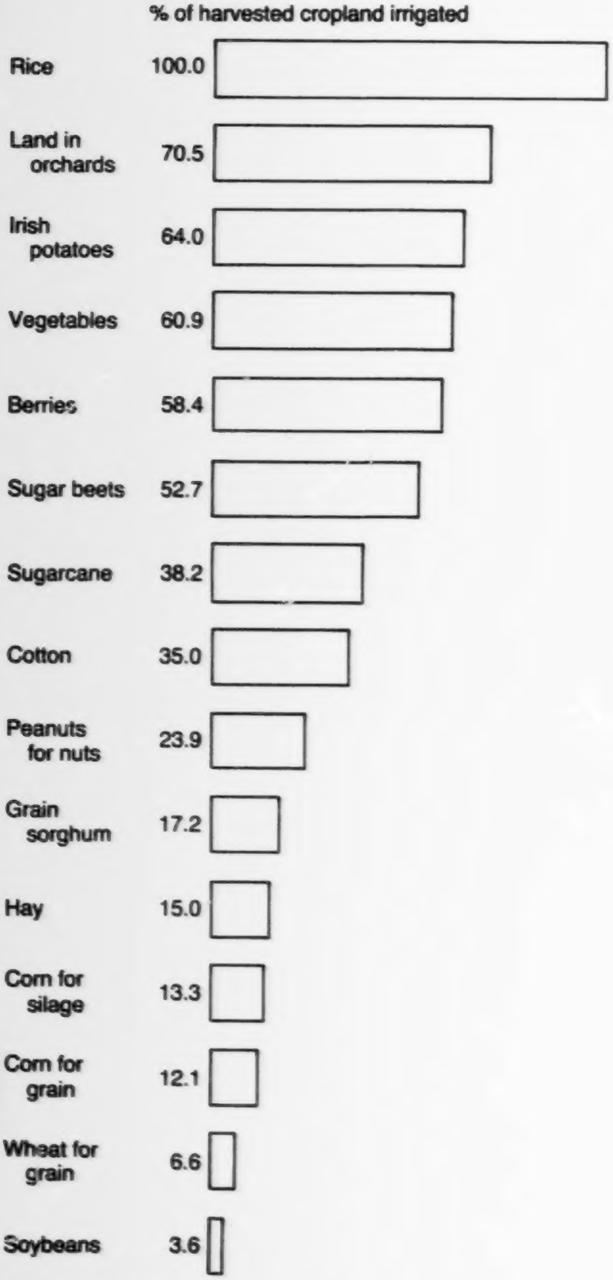


Source: 1979 and 1984 Farm and Ranch Irrigation Surveys.

Chart 69

Percentage of Harvested Cropland Irrigated

The percentage of harvested cropland irrigated varies by crop. Differences can be due to geographic concentration of production, and variations in cultural practices.

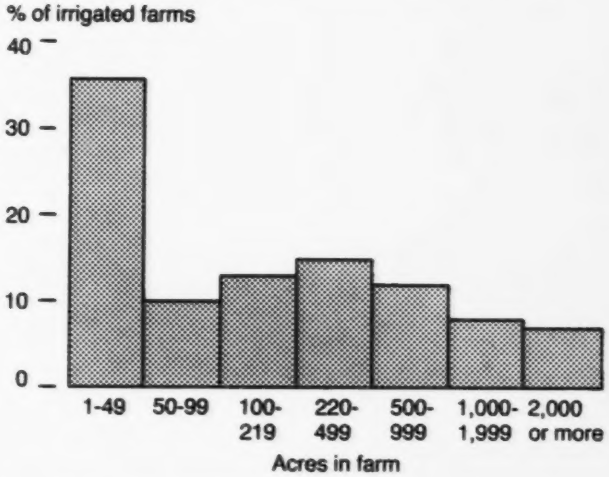


1982 data. Source: Census of Agriculture.

Chart 70

Distribution of Irrigated Farms by Farm Size

Some 277,713 farms were irrigated in 1982. About 36 percent of these irrigated farms had 49 acres or less but accounted for only 2 percent of irrigated land in farms (see chart 71).

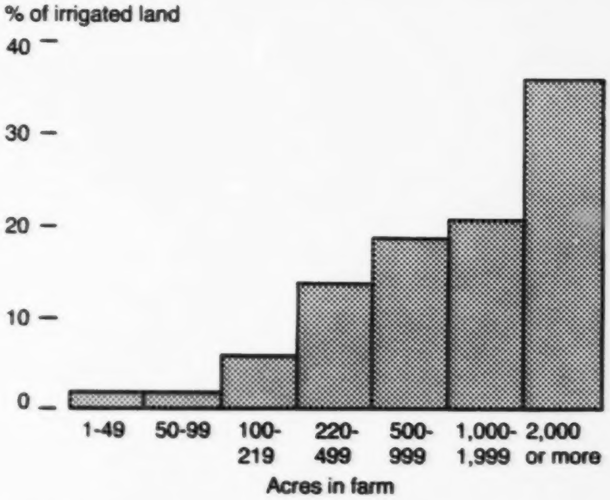


1982 data. Data does not add to 100 due to rounding. Source: Census of Agriculture.

Chart 71

Distribution of Irrigated Land in Farms by Farm Size

Irrigated land in 1982 exceeded 48.6 million acres. Farms with 2,000 or more acres accounted for 36 percent of all irrigated acres but 7 percent of all irrigated farms (see chart 70).

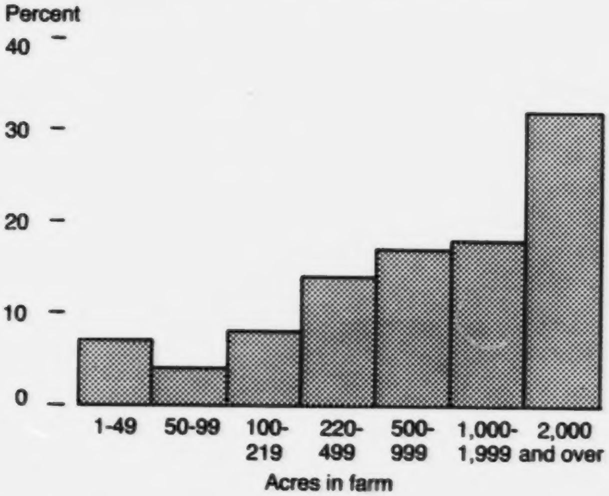


1982 data. Source: Census of Agriculture.

Chart 72

Distribution of Sales of Agricultural Products from Irrigated Farms

The value of all agricultural products sold by irrigated farms in 1982 exceeded $39.5 billion. Farms with less than 50 acres accounted for about 7 percent of irrigated farms' sales.

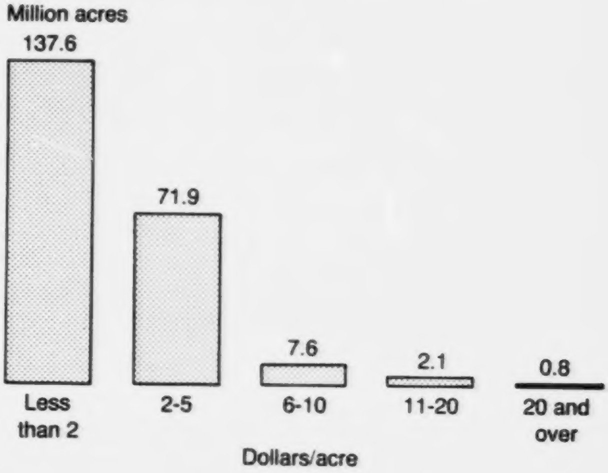


Source: 1982 Census of Agriculture.

Chart 73

Productivity Losses from Sheet and Rill Erosion

Almost 62 percent of U.S. erosion-prone cropland suffers damage of less than $2 per acre per year. Three million acres suffered losses greater than $10 per acre in 1982.

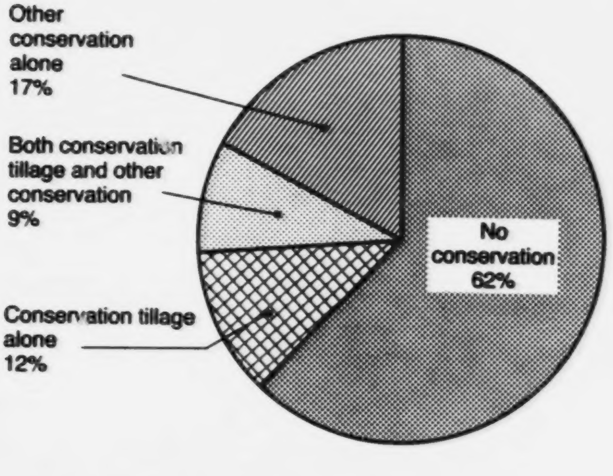


1982 data. Losses on 220 million acres of cropland where soil erosion is the primary management problem.

Chart 74

Percentage of Farms Practicing Soil Conservation

About 38 percent of the Nation's farmers practice some kind of soil conservation, including reduced tillage methods, contouring, strip cropping, and terracing.

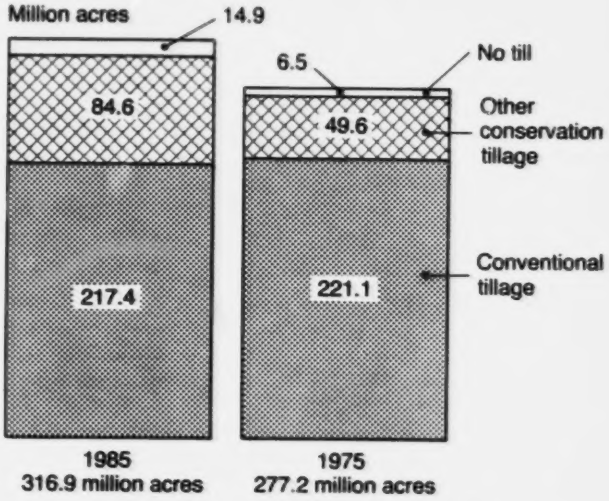


1983 data. Includes only farms with cropland. Source: Farm Production Expenditure Survey.

Chart 75

Changes in Tillage Use

Conservation tillage methods, which leave additional residue on the soil surface after planting, nearly doubled in use during 1975-85, due to cost and time savings.

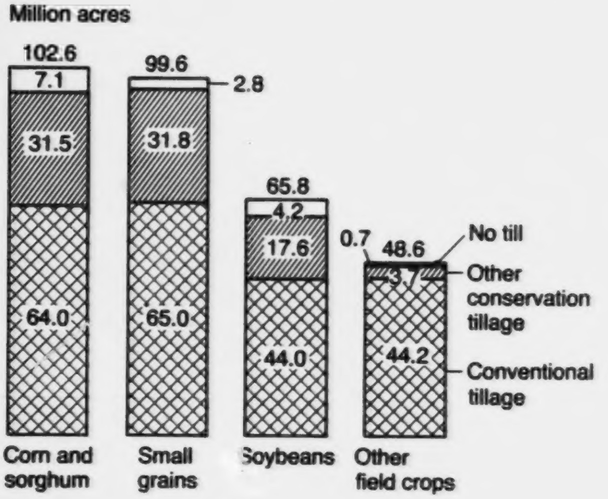


Sources: Conservation Tillage Information Center and the No-Till Farmer.

Chart 76

Tillage Methods Used on Major Crops

Percentage of acreage under all conservation tillage methods is greatest for double-cropped soybeans, where the practice helps farmers get the second crop into the ground quickly.

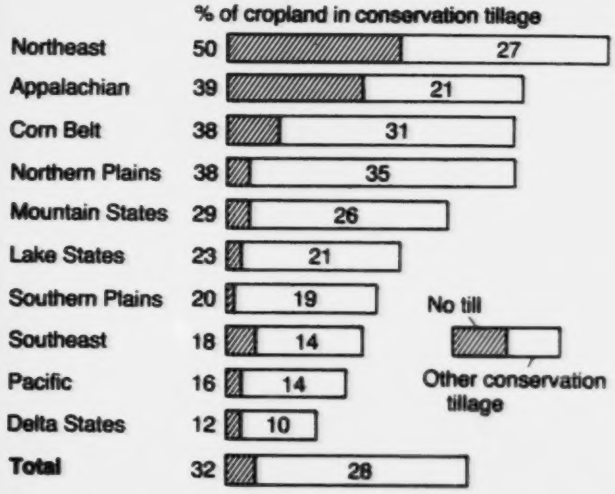


1985 data. Source: Conservation Tillage Information Center.

Chart 78

Regional Use of Conservation Tillage

The Northeast, with the smallest amount of cropland in the Nation, used conservation tillage on 50 percent of its cropland in 1985, the highest proportion in the Nation.

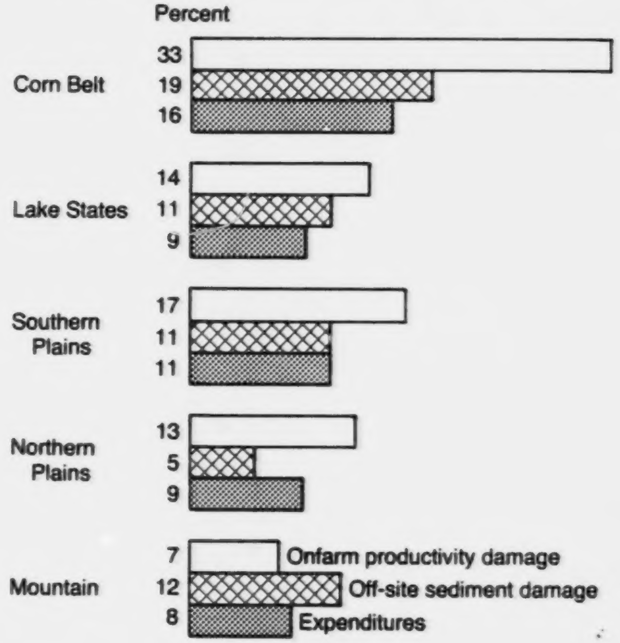


1985 data. Source: Conservation Tillage Information Center.

Chart 77

Erosion Damage and Conservation Expenditures

Conservation expenditures are not made proportionately to damage incurred. Nonsoil conservation benefits from conservation practices probably account for some of the discrepancy.

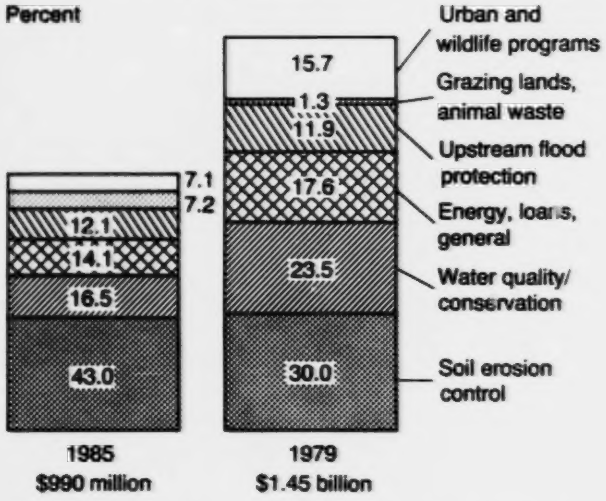


1982 data. Sheet, rill, and wind erosion only.

Chart 79

USDA Expenditures for Natural Resource Conservation

Although the USDA conservation budget fell 32 percent during 1979-85, soil conservation's share of the total budget grew from 30 to nearly 43 percent.

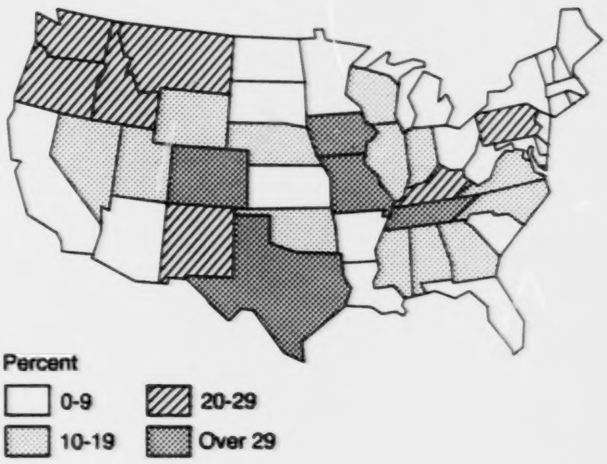


Expenditures in 1985 dollars. 1985 percentages estimated; based on 1984.

Chart 80

Acreage Eligible for the Conservation Reserve Program as a Percentage of Total Cropland by State

About 69.5 million acres of U.S. cropland were eligible for the reserve in 1986. Eligible land included land eroding at more than three times the permissible rate.

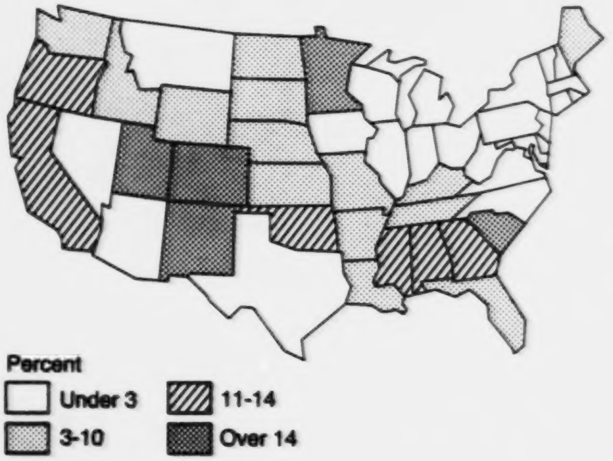


1986 data.

Chart 81

Conservation Reserve Acreage as a Percentage of Eligible Cropland

About 3.8 million acres were enrolled in the 1986 reserve program. The cropland enrolled as a percentage of total eligible varied by State from 0-44 percent.

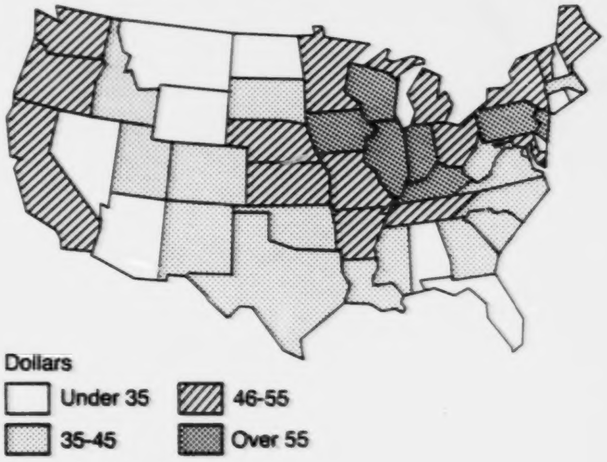


1986 data.

Chart 82

Average Annual per Acre Rental Payment for Conservation Reserve Lands by State

Average annual rental payments on land in the Conservation Reserve Program varied from $32-$71 for the 48 contiguous States, with a national average of $43.50 per acre.

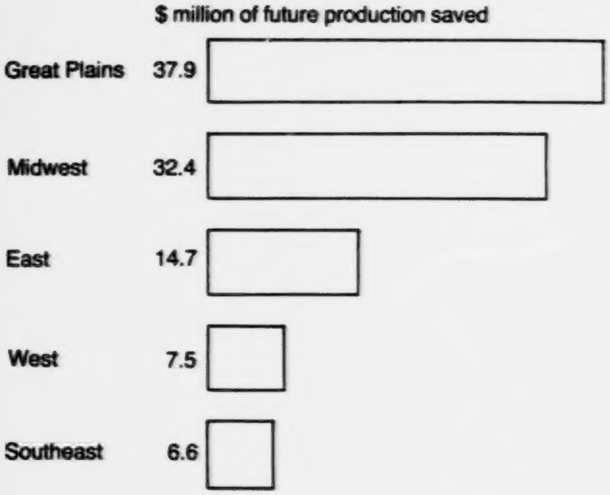


1986 data.

Chart 83

Productivity Benefits of Major USDA Conservation Programs

Because conservation problems tend to be concentrated on cropland in the Plains and Midwest, farm benefits of conservation are also concentrated in these two regions.

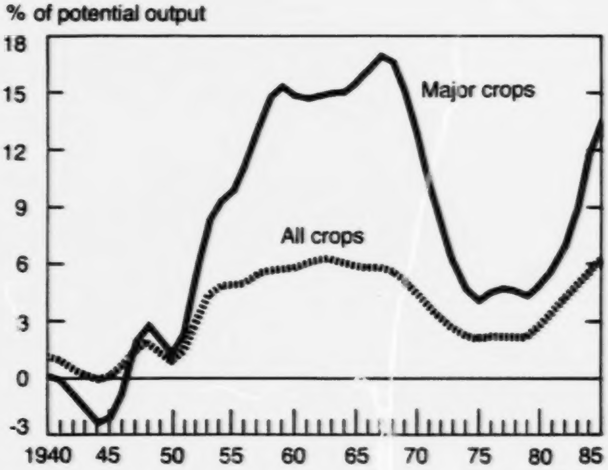


1983 data. 1983 total benefits $99.1 million.

Chart 84

Excess Production Capacity of U.S. Agriculture

Excess capacity is the difference between potential output and commercial demand at prevailing farm prices. It is shown as a percentage of potential output.

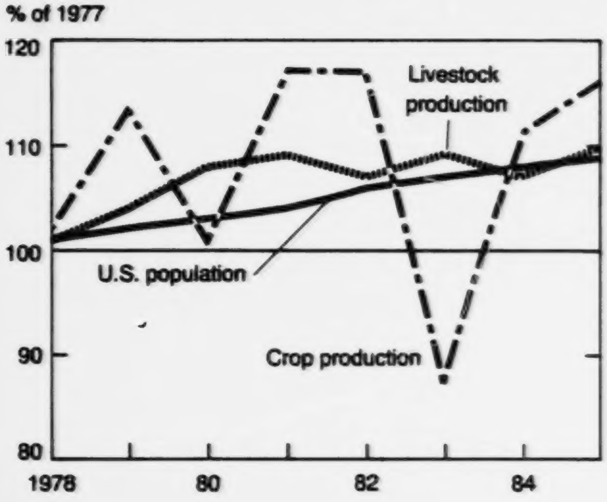


Percentages calculated as 7-year moving averages. Major crops include wheat, feed grains, soybeans, and cotton.

Chart 85

Crop and Livestock Production

Livestock production was record high in 1985, driven by gains in milk and poultry production of 6 and 4 percent, respectively. Crop production rose 5 percent.

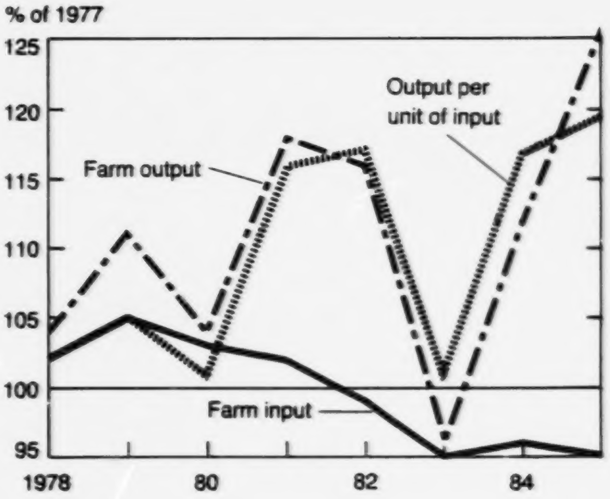


1985 preliminary.

Chart 86

Farm Productivity

Increases in farm input use were only a third of those for farm output, resulting in rises of 3-4 percent for output per unit of input, a record high.



1985 preliminary.

Definition of a Farmer Cooperative

For survey purposes, a cooperative is defined as an association that meets the following requirements:

(1) Farmers or agricultural producers hold the controlling interest in the cooperative;

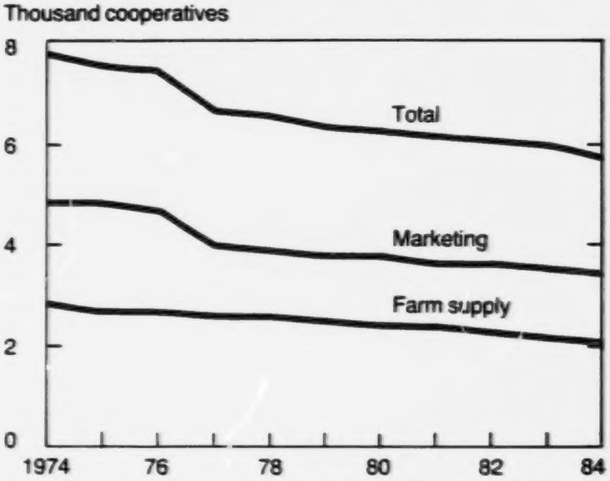
(2) No member of the cooperative is allowed more than one vote because of the amount of stock or membership capital owned *or* the cooperative does not pay dividends on stock or membership capital in excess of 8 percent a year, or the legal rate in the State, whichever is higher; and

(3) The cooperative does not deal in products of nonmembers in an amount greater in value than it handles for its members.

Chart 87

Farmer Cooperatives in the United States

The decrease in the total number of cooperatives in 1984 to 5,782 (207 fewer than in 1983) resulted from mergers, consolidations, acquisitions, and co-ops going out of business.

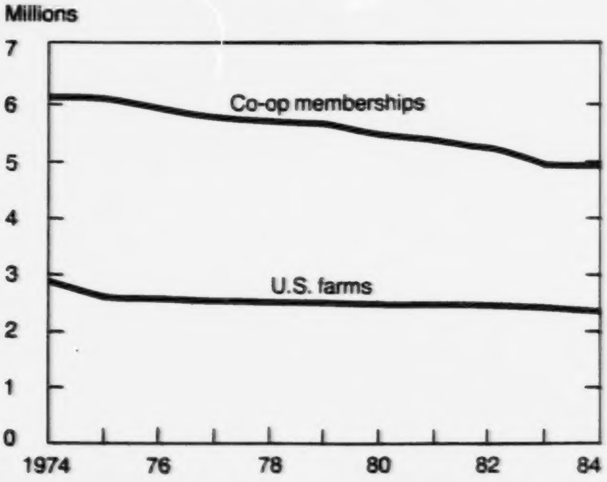


Total includes a small number of cooperatives that provide specialized related services.

Chart 88

U.S. Farms and Farmer Cooperative Memberships

The long-term decline in co-op memberships reflects the decreasing number of U.S. farms and farmers. Many farmers are members of more than one co-op.

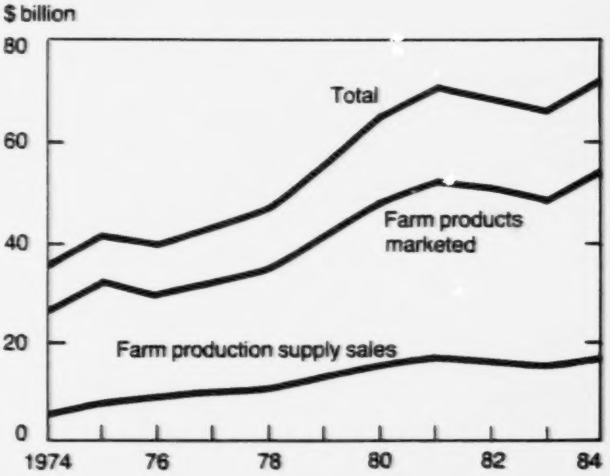


Memberships include duplication that cannot be eliminated using current reporting methods.

Chart 89

Business Volume of Farmer Cooperatives

Total net business volume of farmer cooperatives reached a record-high $73 billion in 1984, up 9.4 percent from $66.8 billion in 1983.

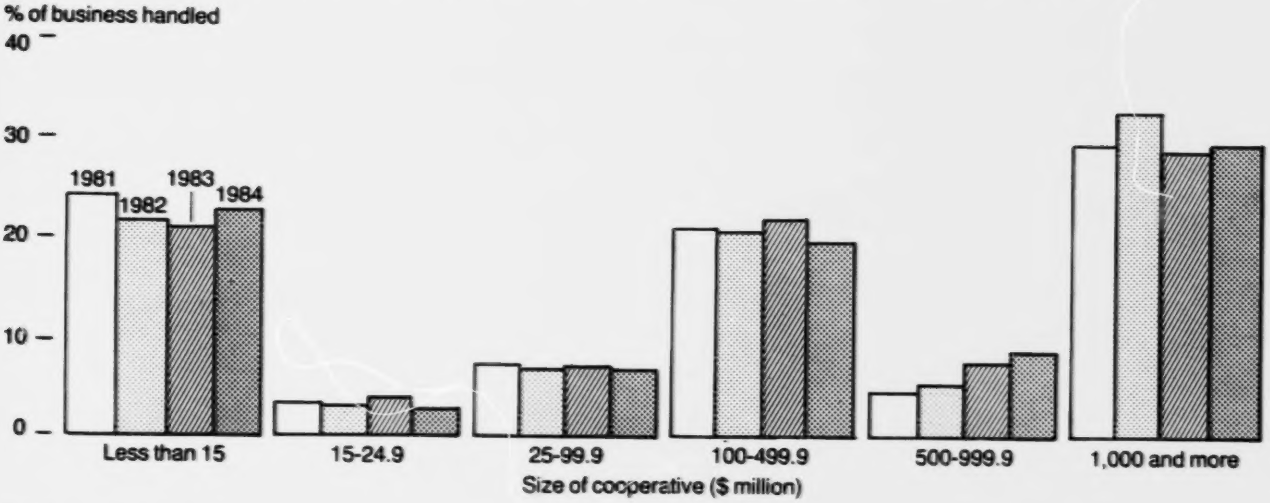


Business volume on net basis; excludes intercooperative sales but includes receipts for specialized services provided to patrons.

Chart 90

Distribution of Farmer Cooperative Business by Size of Cooperative

Co-ops with business volumes of $15 million or more represented 75.9 percent of total gross dollar volume in 1984. The 28 co-ops with business of $500 million or more (less than 1 percent of total) accounted for a greater percentage of gross sales (42.3 percent) than the 5,253 co-ops with business of less than $15 million (24.1 percent).

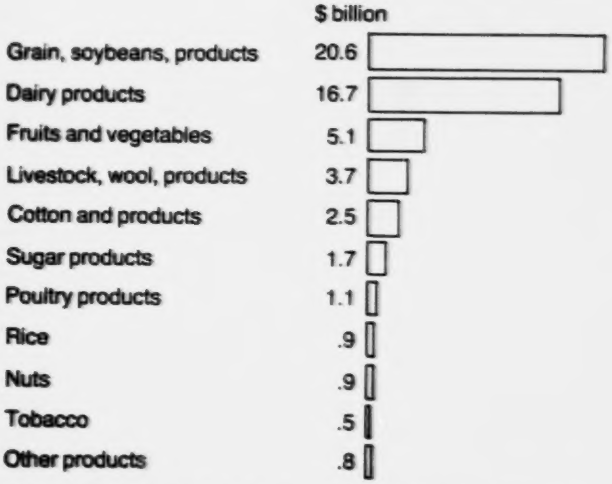


Size of cooperative based on gross sales.

Chart 91

Farm Products Marketed by Farmer Cooperatives

Grain, soybeans, and products; dairy products; fruits and vegetables; and livestock, wool, and products together accounted for 84 percent of net co-op marketing business.

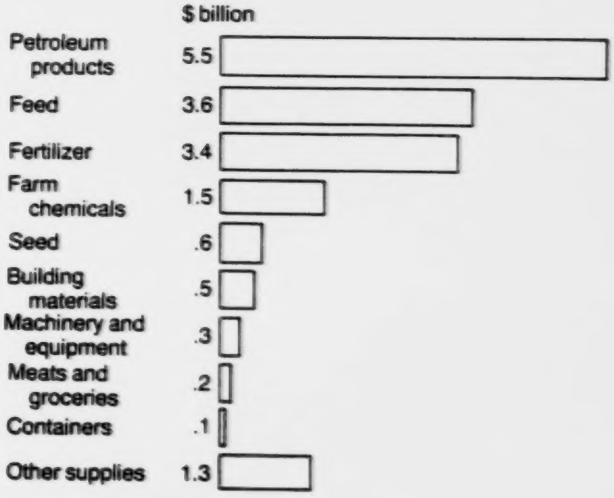


1984 data. Total net marketing business = $54.6 billion. Total may not add due to rounding. Other products include dry beans and peas.

Chart 92

Farm Supplies Handled by Farmer Cooperatives

Petroleum products, feed, and fertilizer dominated production supply sales, together accounting for 74 percent of total net co-op supply sales.

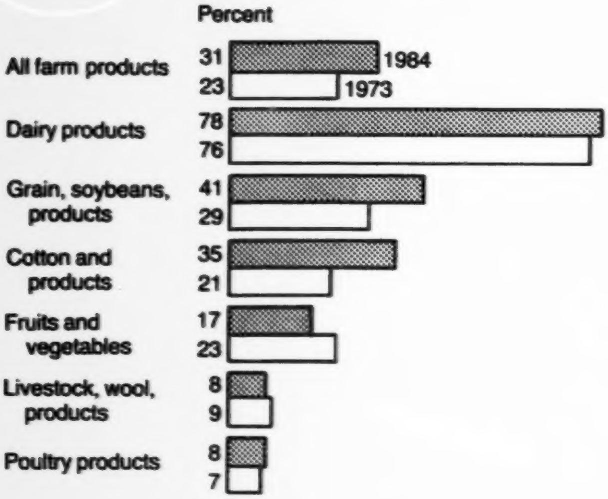


1984 data. Total net farm supply business = $17 billion.

Chart 93

Cooperatives' Share of Marketing Activity

The 8-percent increase in all farm products marketed at the first-handler level was mostly due to greater volumes of cotton and products and grain, soybeans, and products.



First-handler level.

Chart 94

Cooperatives' Share of Purchasing Activity

The 4-percent increase in all farmer purchases of major farm supplies through cooperatives was mostly due to larger volumes of farm chemicals moving through cooperatives.

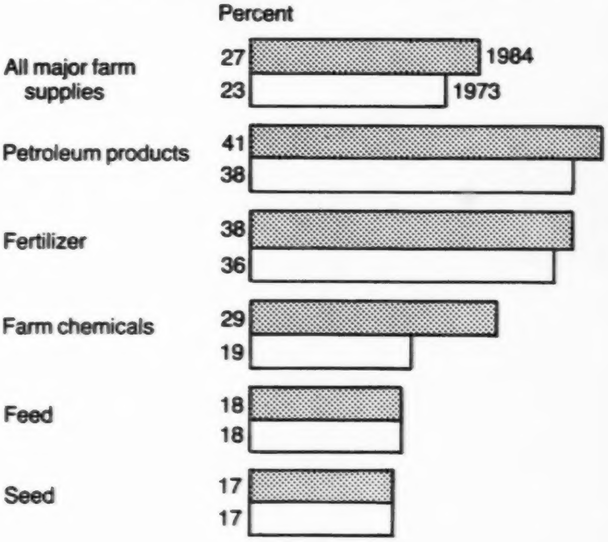
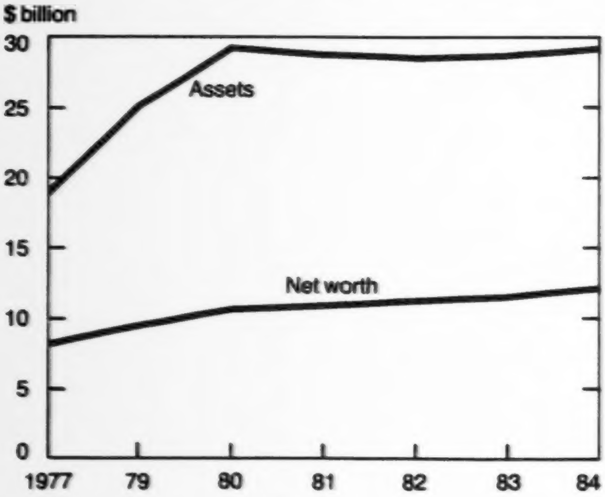


Chart 95

Assets and Net Worth of Farmer Cooperatives

Assets of farmer cooperatives totaled $29.2 billion in 1984, up 1.3 percent from 1983. Net worth, or member and patron equity, totaled $12.2 billion, up 5.6 percent from 1983.

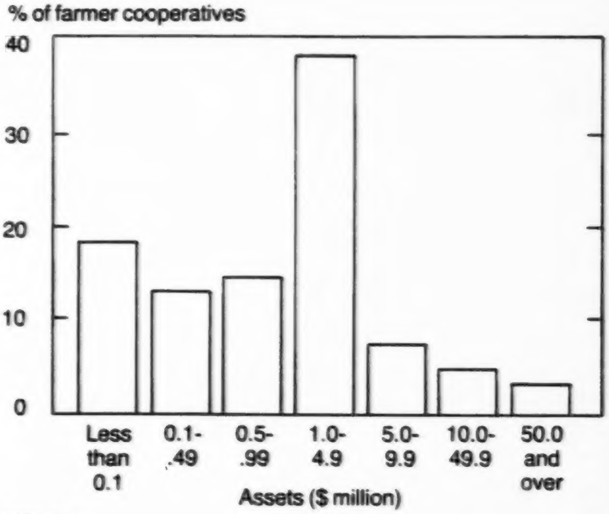


1978 data not available.

Chart 96

Distribution of Farmer Cooperatives by Size of Assets

Nearly 46 percent of farmer cooperatives had assets of less than $1 million, while 8.8 percent had assets of $10 million or more.

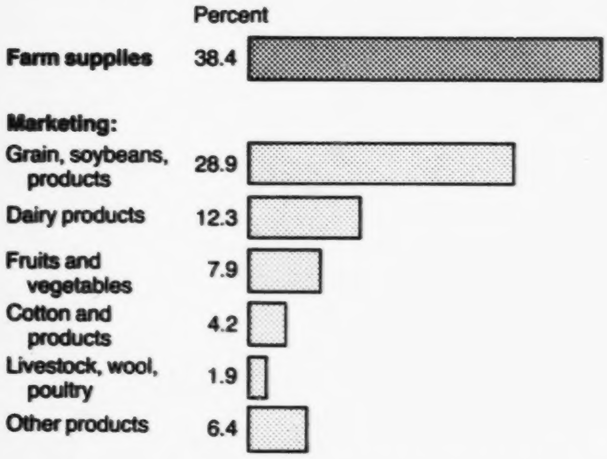


1984 data.

Chart 97

Farmer Equity in Farmer Cooperatives by Major Function

Marketing cooperatives maintained more than half the total equity in farmer cooperatives in 1984, while farm supply cooperatives accounted for 38.4 percent.

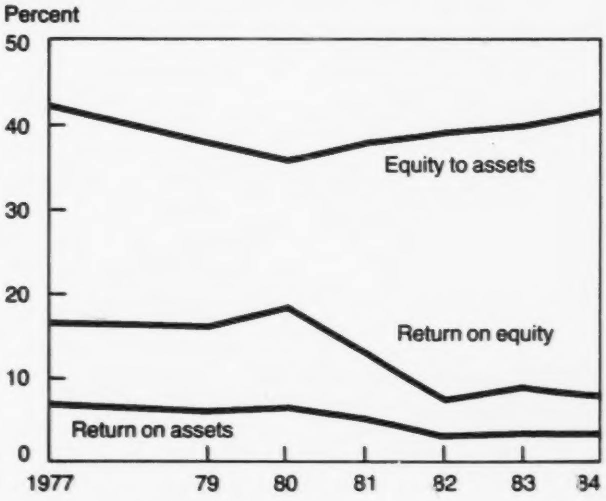


1984 data. Farmer equity = $12.2 billion. Other products include dry edible beans and peas, nuts, rice, sugar products, tobacco, miscellaneous products, and specialized services.

Chart 98

Selected Financial Ratios of Farmer Cooperatives

Both the return on equity and assets ratios in 1984 were about half the 1977 figures. The proportion of total assets financed by equity rose from 40 to 41.7 percent in 1984.

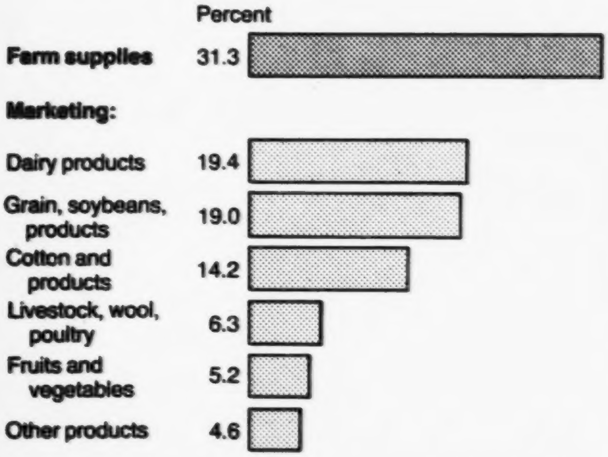


1978 data not available.

Chart 99

Net Income of Farmer Cooperatives by Major Function

Marketing cooperatives' net income fell to $668 million in 1984, or 5.9 percent, while farm supply cooperatives' net income of $316 million was up slightly from 1983.

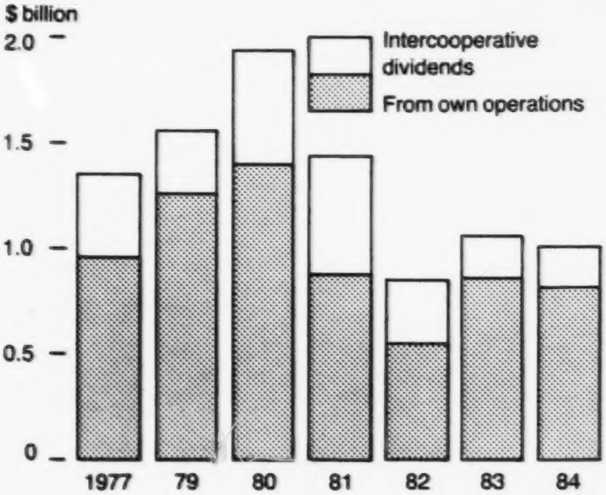


1984 data. Total net income = $1.01 billion. Other products include dry edible beans and peas, nuts, rice, sugar products, tobacco, miscellaneous products, and specialized services.

Chart 100

Net Income of Farmer Cooperatives

Net income in 1984, less losses, totaled nearly $1.01 billion, including intercooperative dividends and refunds. Losses totaled $174.4 million, up from $88.7 million in 1983.



1978 data not available.

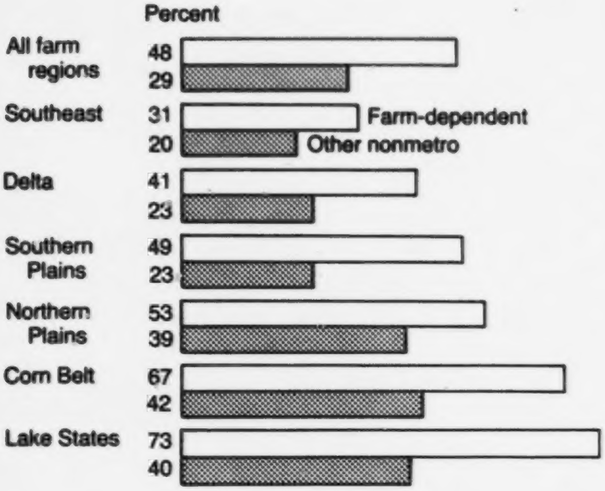
Population and Rural Development

Farm-Dependent Counties

Chart 101

Proportion of Nonmetro Counties Losing Population, 1982-84

Almost half of all farm-dependent counties lost population during 1982-84 compared with less than one-third for other nonmetro counties.

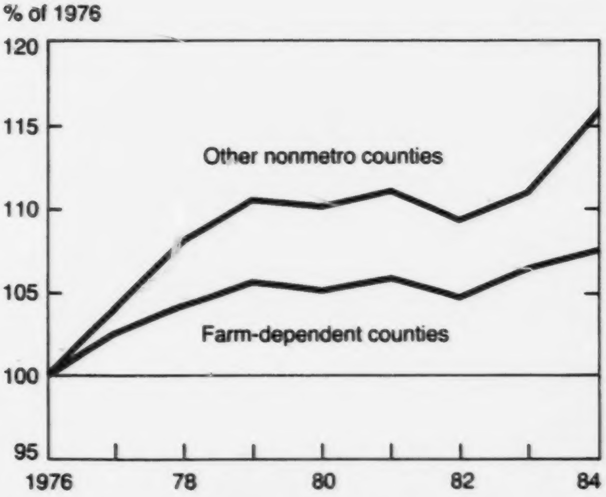


Source: Bureau of the Census.

Chart 102

Nonmetro Employment Growth

Since 1976, the employment growth rate in farm-dependent counties has been roughly one-half the rate in other nonmetro counties.

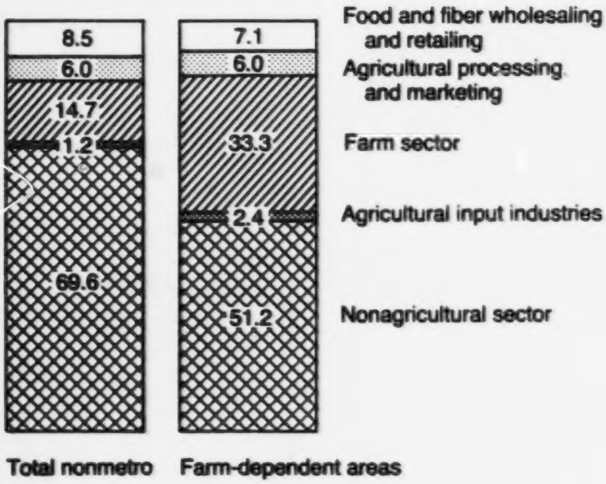


Source: Bureau of Economic Analysis, U.S. Department of Commerce.

Chart 103

Nonmetro Agriculture-Related Employment

Over 30 percent of all employment in nonmetro America is in farming or in the industries supplying farm inputs or processing farm products.

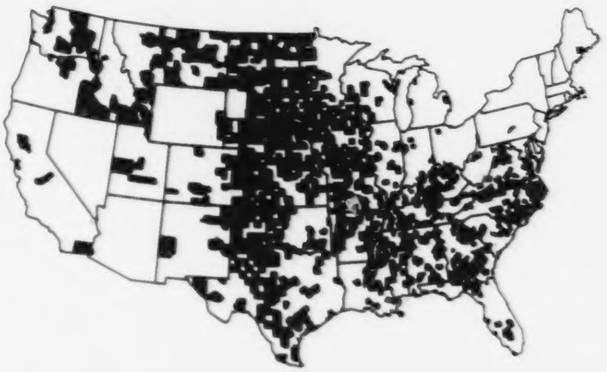


1982 data.

Chart 104

Nonmetro Counties With at Least One-Third of Total Employment in Agriculture

Farm and farm-related employment dominates the economies of counties throughout the Plains, the western Corn Belt, and many areas of the Southeast.

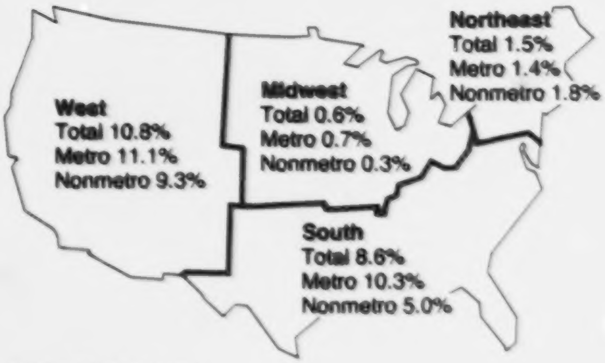


1982 data. Agriculture includes agricultural input workers, farmers, and processing workers. Source: Estimated from U.S. Department of Commerce data.

Chart 105

Regional Population Growth, 1980-85

Growth rates in the South and West exceed national rates. Everywhere but the Northeast, the population in nonmetro areas grew more slowly during 1980-85 than in metro areas.


Northeast
Total 1.5%
Metro 1.4%
Nonmetro 1.8%
West
Total 10.8%
Metro 11.1%
Nonmetro 9.3%
Midwest
Total 0.6%
Metro 0.7%
Nonmetro 0.3%
South
Total 8.6%
Metro 10.3%
Nonmetro 5.0%

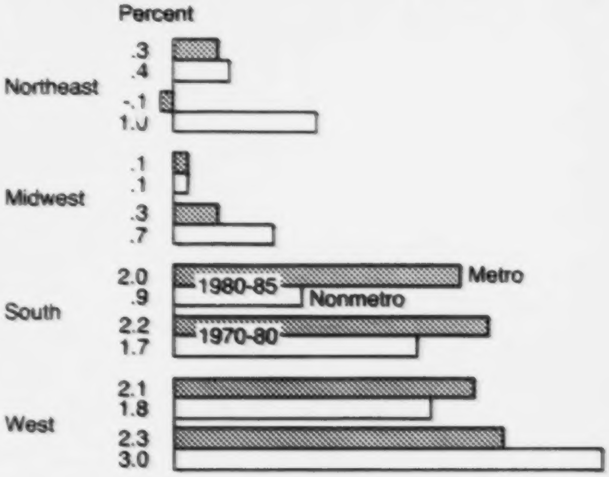
United States 5.4%
Metro 5.9%
Nonmetro 3.8%

West and U.S. totals include Alaska and Hawaii.
Source: Bureau of the Census.

Chart 106

Annual Average Change in Metro and Nonmetro Population by Region

Nonmetro population continued its slow growth in 1985. Although the nonmetro West grew substantially, its rate now lags the metro rate for the first time since the 1970's.

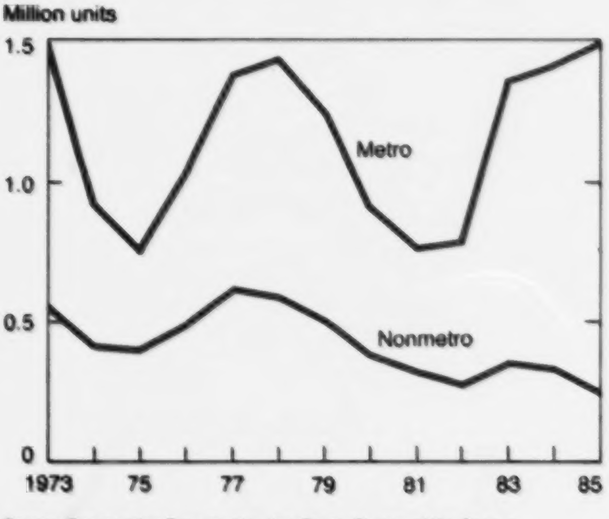


U.S. averages: 1980-85 metro 1.1 percent, nonmetro 0.7 percent; 1970-80 metro 1.0 percent, nonmetro 1.4 percent. Source: Bureau of the Census.

Chart 107

New Housing Starts

Metro housing starts in 1985 reached the 1973 record level of 1.5 million units, while nonmetro starts of 248,000 units were less than one-half the 1973 level.

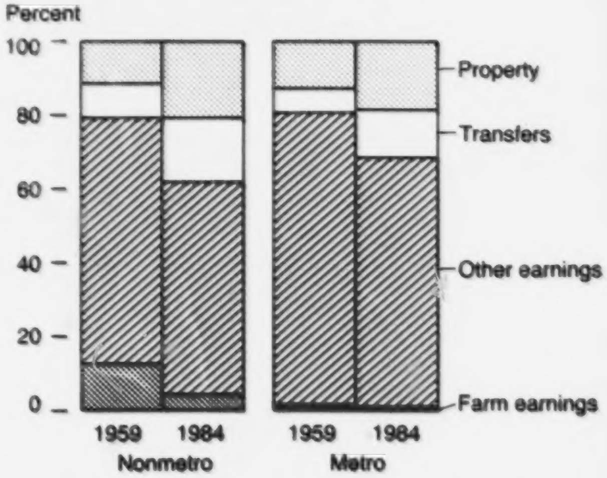


Source: Construction Reports, Housing Starts, Bureau of the Census.

Chart 108

Personal Income by Source

Farm and nonfarm earnings provided a smaller share of income in 1984 than in 1959, while transfer payments and property income accounted for a larger share.

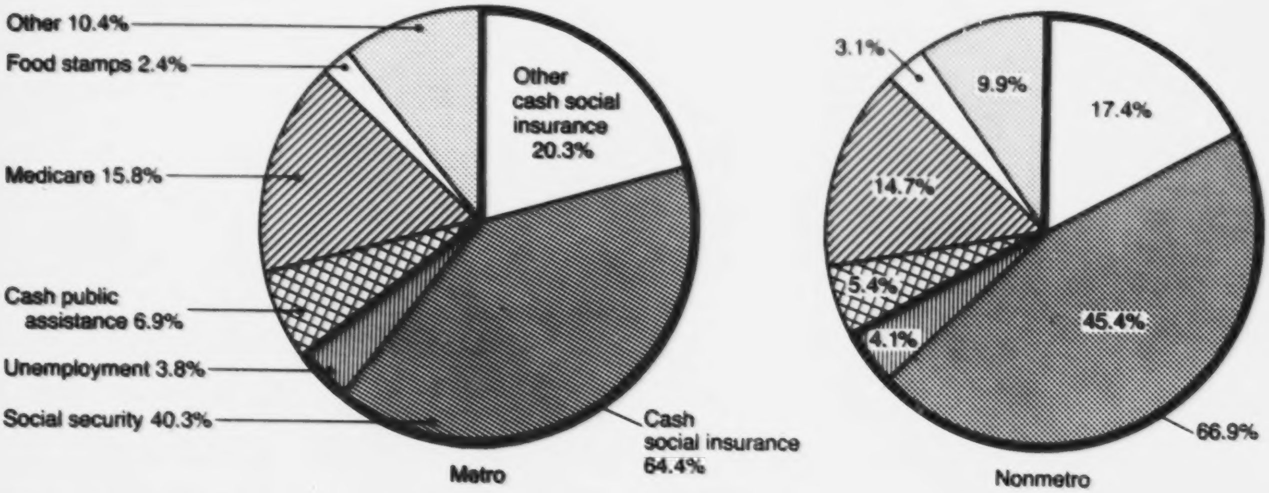


Source: Local Area Personal Income, U.S. Department of Commerce, Bureau of Economic Analysis.

Chart 109

Composition of Transfer Payments

Transfer payment income amounted to $417 billion in 1984, mostly from cash social insurance programs (such as social security and unemployment insurance). In-kind transfers (medicare and food stamps) accounted for nearly one-fifth of all transfer payments.

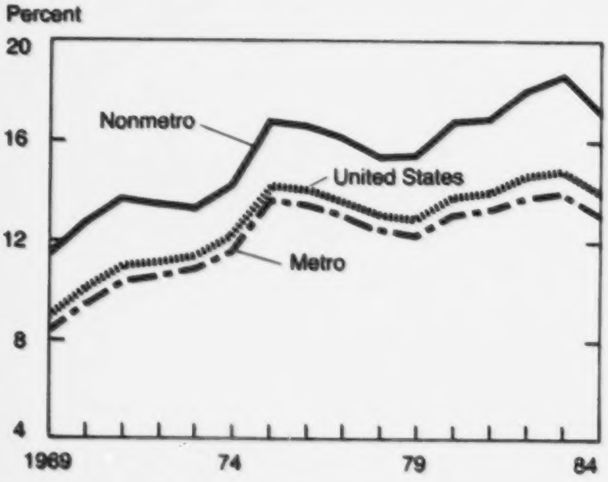


1984 data. Source: Local Area Personal Income, U.S. Department of Commerce, Bureau of Economic Analysis.

Chart 110

Transfer Payments as Percentage of Total Personal Income

Transfers are an increasingly important share of personal income, reflecting both a decline in earnings' share and an increase in transfer payment expenditures.

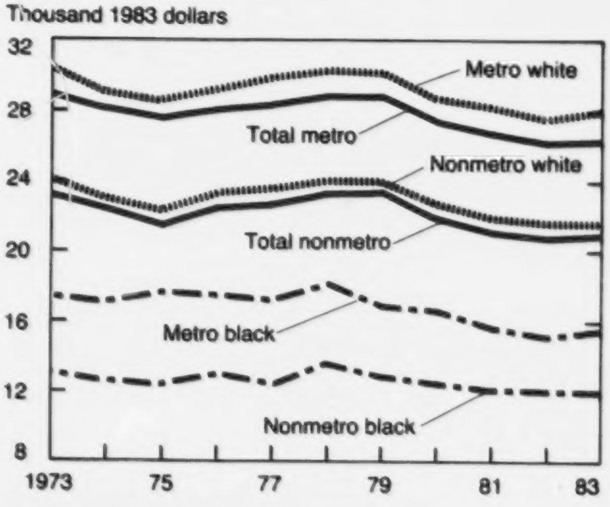


Source: Local Area Personal Income, U.S. Department of Commerce, Bureau of Economic Analysis.

Chart 111

Median Family Income

Metro and white families continue to have higher income than nonmetro and black families. After a 1981-82 decline, 1983 incomes in all categories rose slightly.

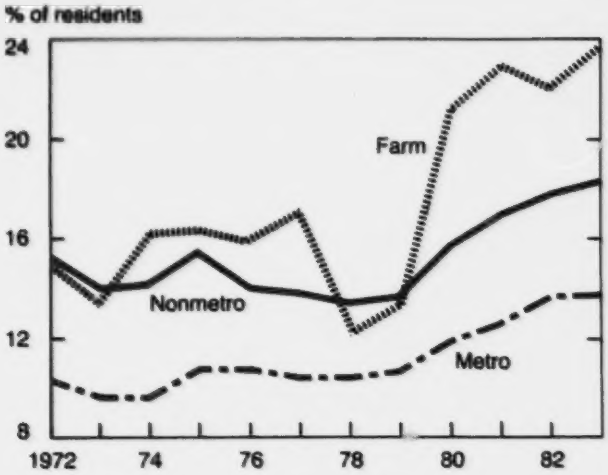


Source: Current Population Survey, Bureau of the Census.

Chart 112

Poverty Rates

Nonmetro poverty rates continue to be higher than metro rates, although metro, nonmetro, and farm poverty rates have all risen dramatically since 1980.

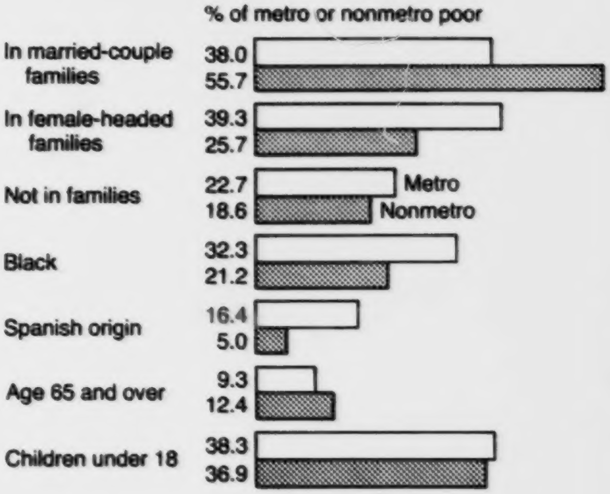


The farm poverty rate is proportion of all residents living on farms who are poor.
Source: Current Population Survey, Bureau of the Census.

Chart 113

Characteristics of Persons in Poverty

The nonmetro poor are more likely than metro poor to be elderly or live in married-couple families. In metro and nonmetro areas, over one-third of the poor are children.

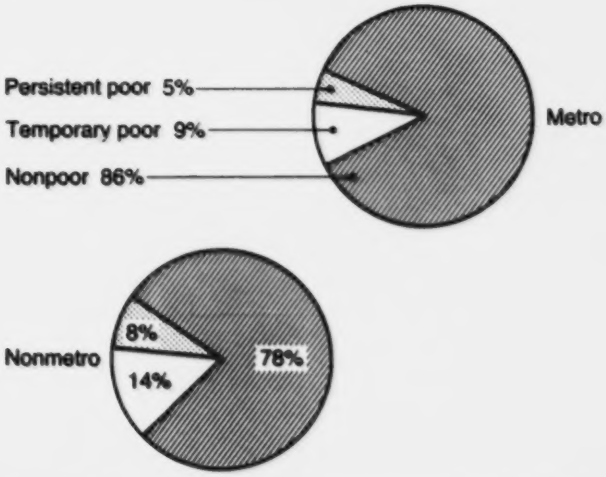


1983 data. Source: Current Population Survey, Bureau of the Census.

Chart 114

Duration of Poverty in Metro and Nonmetro Areas, 1978-82

The proportion of persons who were persistently poor (poor 3 or more years during 1978-82) or temporarily poor (poor 1-2 years) was higher in nonmetro areas.

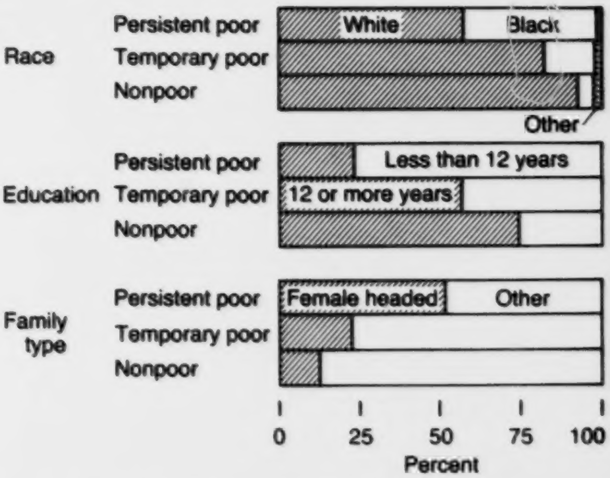


Source: Panel Study of Income Dynamics, Survey Research Center, University of Michigan.

Chart 115

Characteristics of Nonmetro Persons by Duration of Poverty

The persistent poor are more likely than the temporary poor or nonpoor to be nonwhite, have less than 12 years of school, and live in female-headed families.

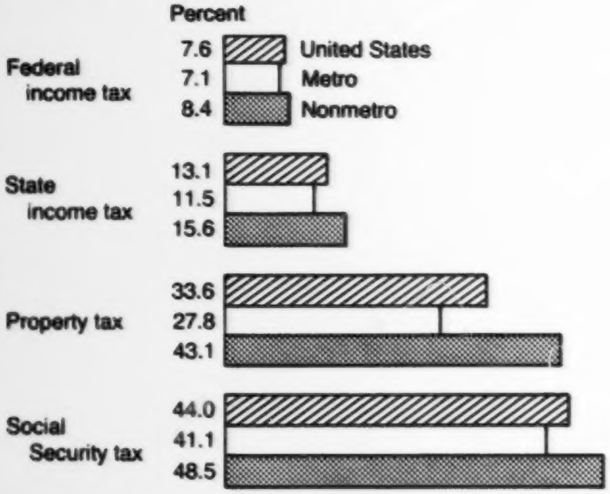


Poverty duration is for 1978-82 period. Characteristics are for 1982.
Source: Panel Study of Income Dynamics, University of Michigan.

Chart 116

Percentage of Poor Households Paying Selected Taxes

Nonmetro poor households are more likely to rely on earnings and own a home, and consequently to pay taxes, than metro poor households.

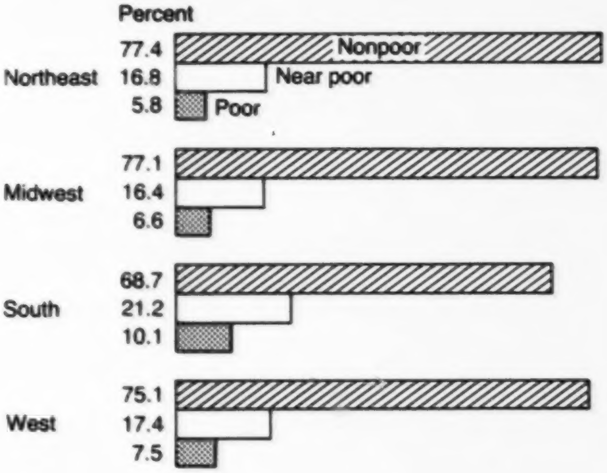


1983 data. Source: Current Population Survey, Bureau of the Census.

Chart 117

Composition of Regional Nonmetro Civilian Labor Force by Poverty Status

The southern nonmetro civilian labor force has the largest proportion of workers with income below the poverty level or near the poverty level.

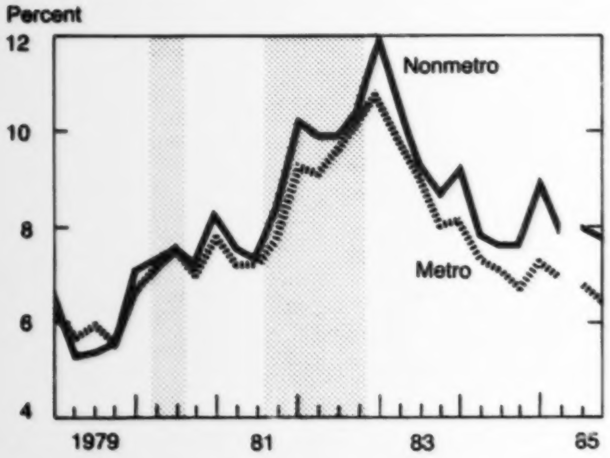


1980 data. Labor force includes unemployed persons seeking and available for employment. Source: Census of Population, Bureau of the Census.

Chart 118

Unemployment Rates for Metro and Nonmetro Areas

Unemployment rates were historically higher in metro than in nonmetro areas. Since the late 1970s, however, nonmetro unemployment rates have been above metro rates.

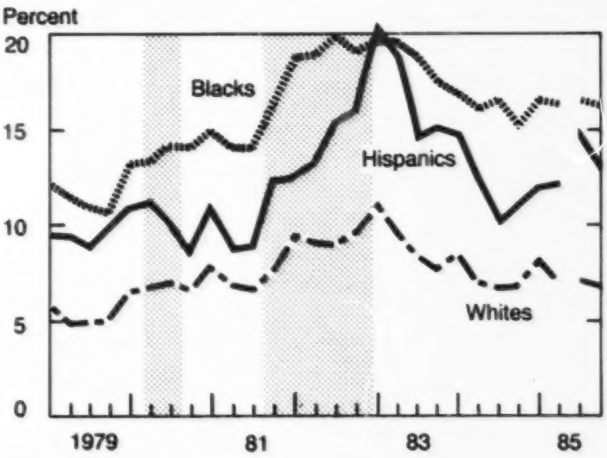


Beginning in third quarter of 1985, definition of metro and nonmetro is based on the 1980 Census. Source: Current Population Survey, Bureau of the Census. Shaded areas indicate recessions.

Chart 119

Nonmetro Unemployment Rates by Racial/Ethnic Group

Unemployment rates for Hispanics and blacks are 1½ to 2 times the rate for whites. All racial/ethnic groups had high unemployment in the early 1980s due to two recessions.

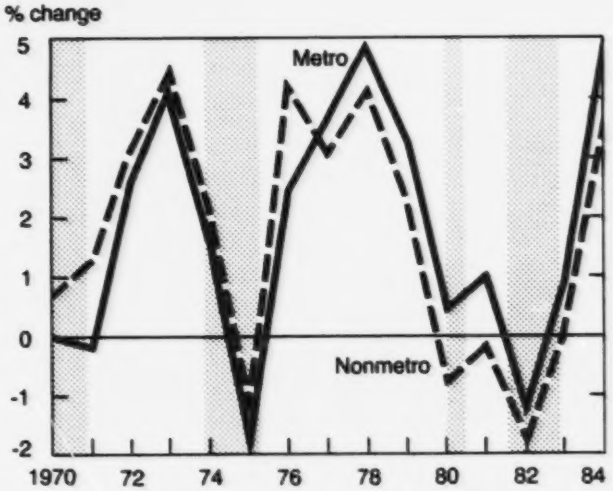


Beginning in third quarter of 1985, definition of metro and nonmetro is based on the 1980 Census. Source: Current Population Survey, Bureau of the Census. Shaded areas indicate recessions.

Chart 120

Annual Employment Changes

Until the mid-1970's, nonmetro employment growth rates exceeded metro rates during both recession and recovery periods.

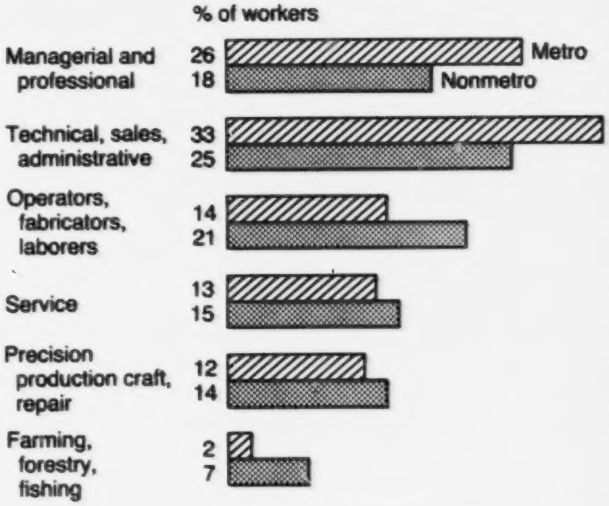


Shaded areas are recessions. Source: Bureau of Economic Analysis.

Chart 121

Distribution of Metro and Nonmetro Workers by Occupation

Nonmetro areas have a higher proportion of workers in blue-collar jobs than metro areas, jobs which run a higher risk of unemployment.

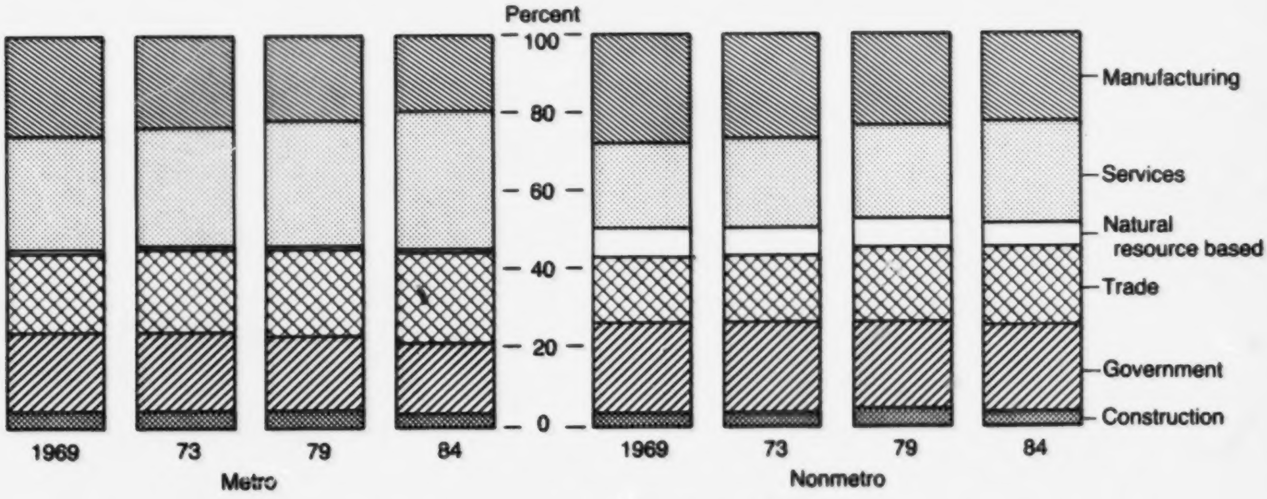


1985 data. Source: Current Population Survey, Bureau of the Census.

Chart 122

Changing Distribution of Employment

Service and trade industries account for a growing share of total wage and salary employment. Resource-based industries provide a greater share of nonmetro jobs.

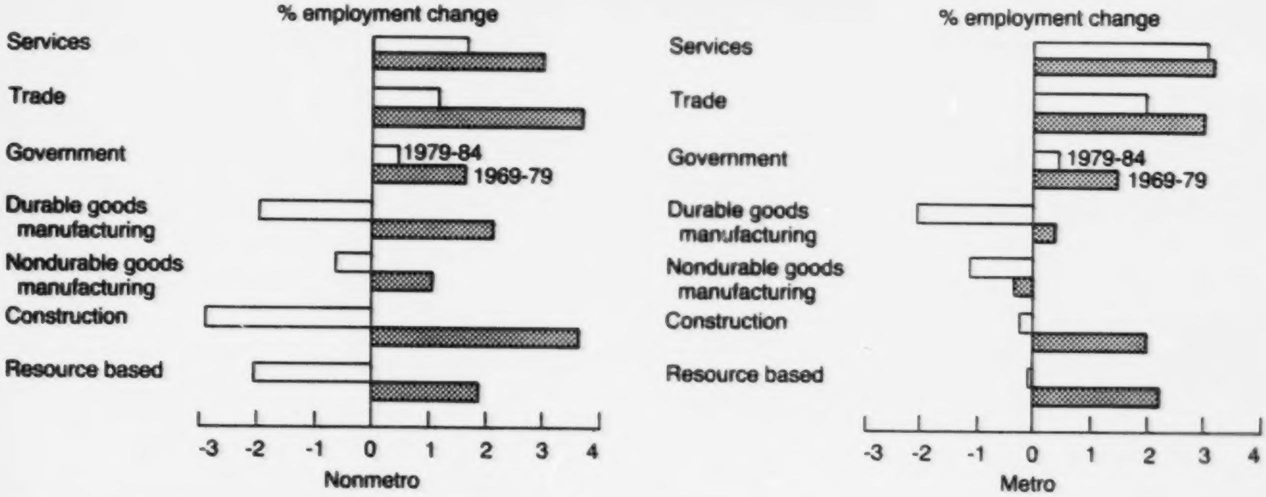


Natural resource based includes farming, mining, forestry, and fisheries. Source: Bureau of Economic Analysis.

Chart 123

Wage and Salary Employment Change by Industry

Nonmetro employment growth rates have fallen significantly more than metro growth rates. Wage and salary employment in government, service, and trade industries has continued growing in the 1980's.

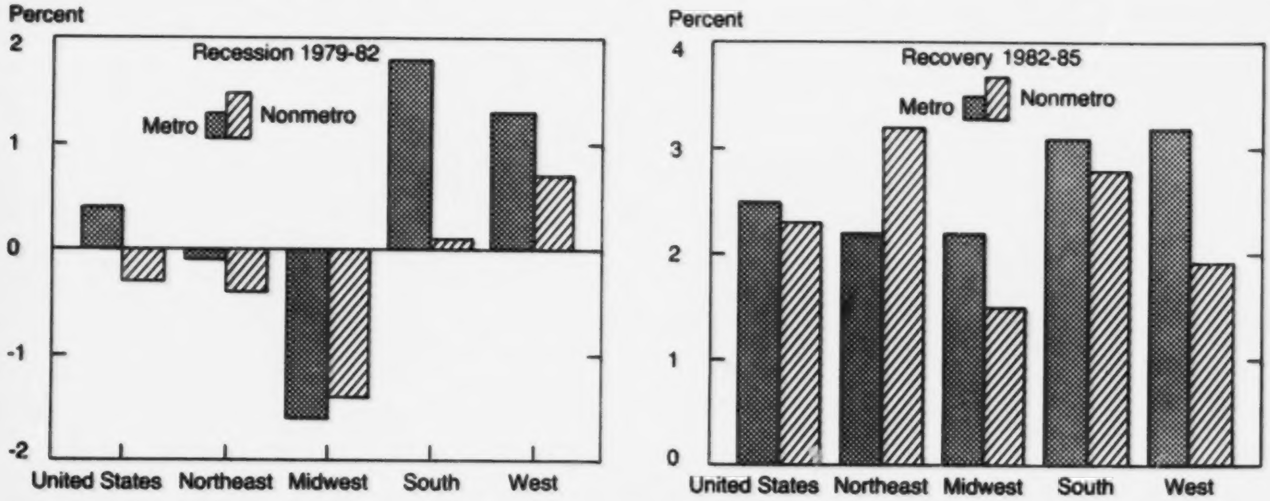


Changes are compounded annual averages. Source: Bureau of Economic Analysis.

Chart 124

Annual Average Employment Changes During Recession and Recovery

Both the Northeast and Midwest lost employment during the 1979-82 recession. Growth slowed in the remaining regions but did not decline. Generally, metro areas fared better than nonmetro areas during both periods.

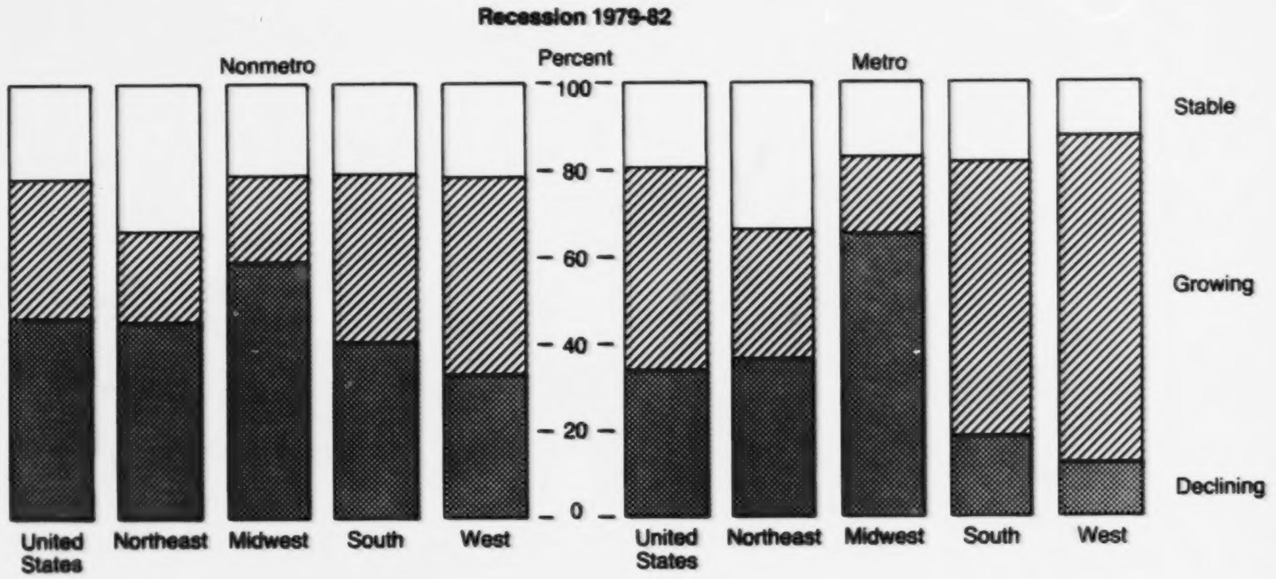


Source: Bureau of Labor Statistics.

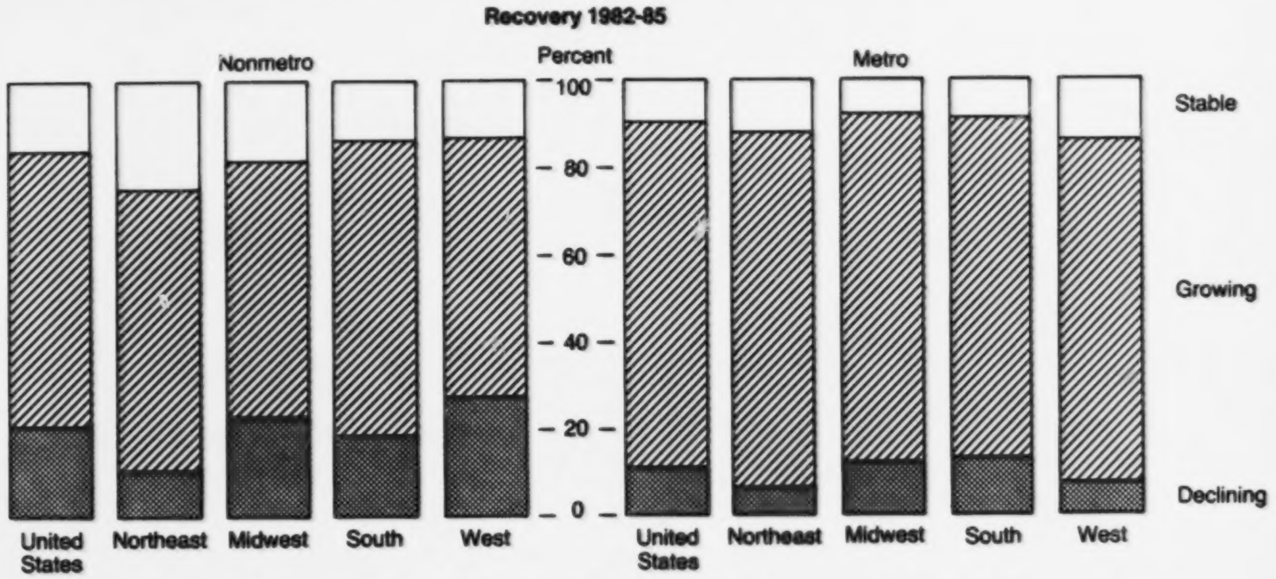
Chart 125

Distribution of Employment Change in Nonmetro and Metro Counties by Region

Most midwestern counties lost employment during the 1979-82 recession, while employment grew in most southern and western counties. Employment fell in almost half of all nonmetro counties.



Employment grew in most metro and nonmetro counties, including those in the Midwest, during the recovery. The proportion of counties with declining employment, however, was still higher in nonmetro areas.

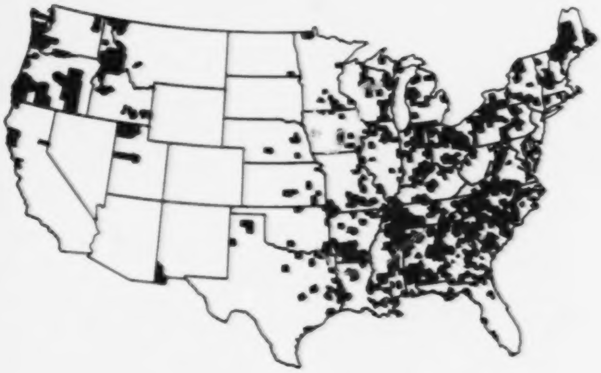


Stable: Employment change less than 2 percent. Growing: Employment increase more than 2 percent. Declining: Employment decrease more than 2 percent. Source: Bureau of Labor Statistics.

Chart 126

Nonmetro Manufacturing-Dependent Counties

Although manufacturing has shifted away from the Northeast and Midwest during the last two decades, the Midwest still accounts for a third of manufacturing-dependent counties.

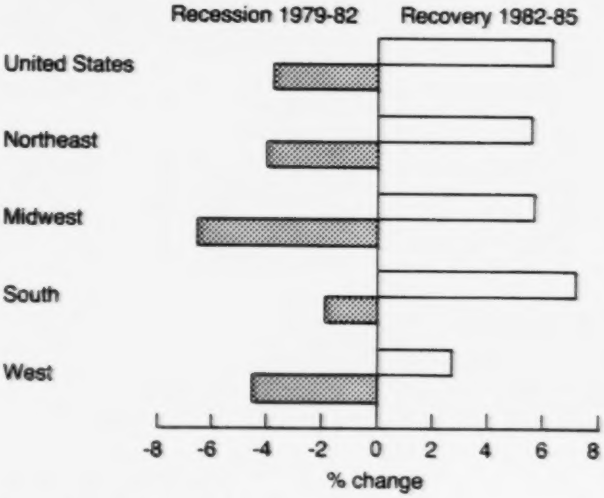


The 678 nonmetro manufacturing-dependent counties are those where manufacturing contributed at least 30 percent to earnings in 1979.

Chart 127

Employment Change in Nonmetro Manufacturing-Dependent Counties

Nonmetro manufacturing counties had larger employment declines during the recession and a higher growth rate during recovery than other nonmetro counties.

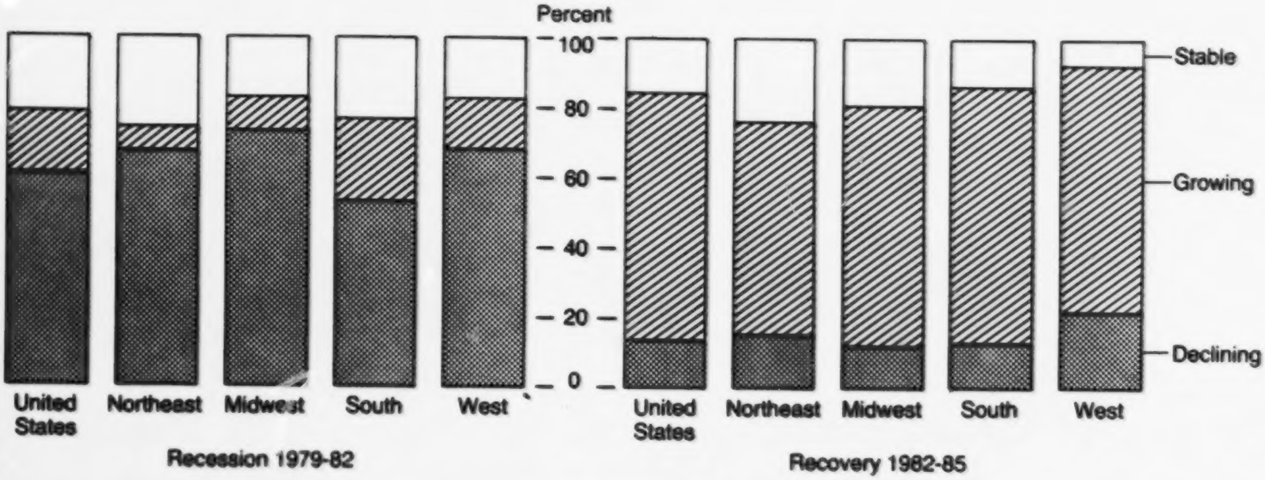


Source: Bureau of Labor Statistics.

Chart 128

Distribution of Employment Change in Nonmetro Manufacturing-Dependent Counties

Proportionately fewer southern manufacturing counties lost employment during the recession. There were no substantial regional differences during the recovery.

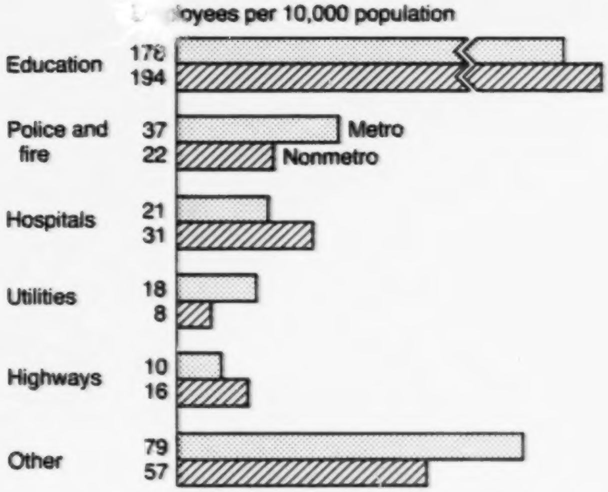


Stable: Employment change less than 2 percent. Growing: Employment increase more than 2 percent. Declining: Employment decrease more than 2 percent. Source: Bureau of Labor Statistics.

Chart 129

Local Government Employment by Function

Almost 60 percent of nonmetro government workers are employed in education.

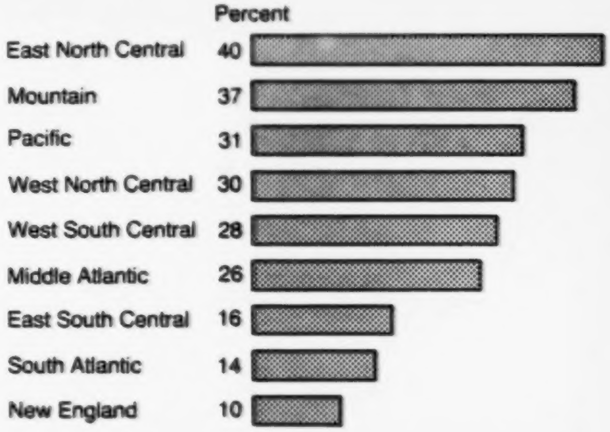


October 1982 full-time equivalent employment. Source: Bureau of the Census.

Chart 130

Percentage of Nonmetro Counties With Local Government Fiscal Stress

Fiscal stress on nonmetro local government was least prevalent in New England and most prevalent in the East North Central States.

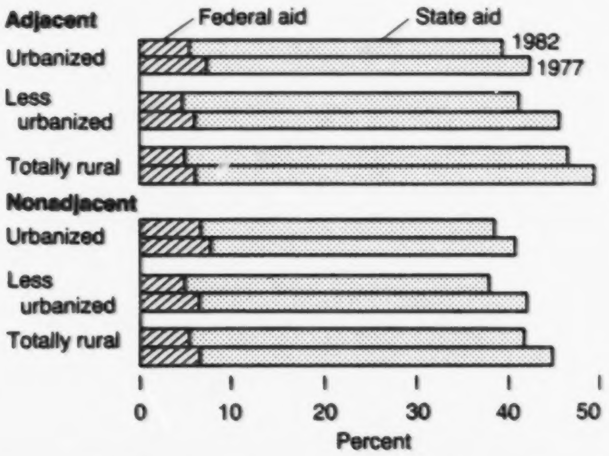


A county had fiscal stress if its local government revenue efforts (local taxes and user fees per dollar of local income) exceeded the average for nonmetro counties and increased during 1977-82. Sources: Bureau of the Census and Bureau of Economic Analysis.

Chart 131

Federal and State Aid as Percentage of Nonmetro Local Government Revenues

The trend toward fiscal decentralization has made nonmetro governments more self-reliant.

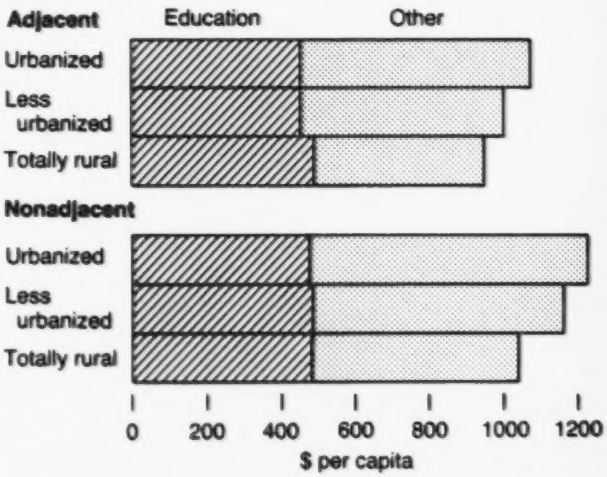


Fiscal year data. Adjacent refers to proximity to metro area. State aid includes that portion of Federal aid which passes through State governments. Source: Bureau of the Census.

Chart 132

Nonmetro Local Government Spending per Capita

Much of the difference in government spending among various types of nonmetro areas is due to spending on government-owned utilities.

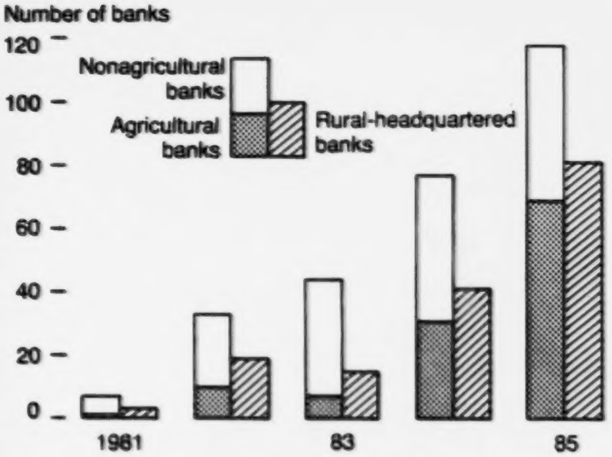


1982 fiscal year. Adjacent refers to proximity to metro area. Source: Bureau of the Census.

Chart 133

Commercial Bank Failures

The number of bank failures has risen dramatically over the last few years, due largely to the failures of rural and agricultural banks.

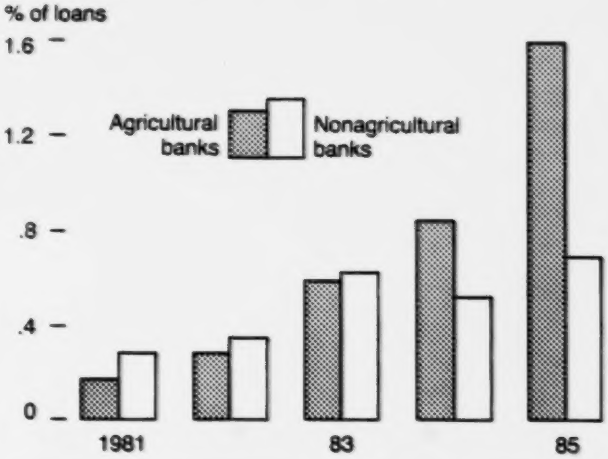


Source: Federal Deposit Insurance Corporation and Federal Reserve Board. Agricultural banks are those with 17 percent or more of their loan portfolio in agricultural loans.

Chart 134

Net Loan Losses for Commercial Banks with Less than $100 Million in Assets

As farm conditions have worsened, the financial health of agricultural banks has also deteriorated, both in absolute terms and relative to other commercial banks.

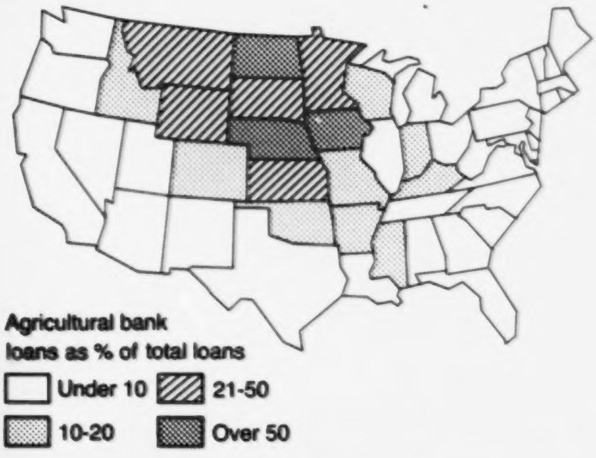


Source: Federal Deposit Insurance Corporation. FDIC defines agricultural banks as those with 25 percent or more of their loan portfolio in agricultural loans.

Chart 135

States Highly Dependent on Agricultural Banks

Because of their dependence on agricultural banks, the banking systems in Iowa, Nebraska, and North Dakota are very sensitive to agricultural developments.

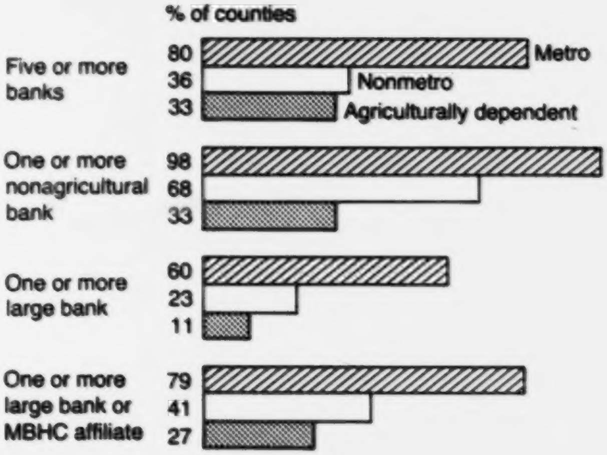


June 1985 data. Source: Federal Reserve Board. Agricultural banks are those with 17 percent or more of their loan portfolio in agricultural loans.

Chart 136

Counties Served by Diversified Banking Systems

Diversified banking systems ease the effect of local economic downturns on credit availability. Banking systems in nonmetro areas tend to be less diverse than those in metro areas.



June 1983 data. Large banks are those with over $500 million in assets. MBHC affiliates are those of a multibank holding company with combined bank assets of $500 million or more. Source: Federal Reserve Board.

Chart 137

General Economic Indicators: Industry

Industrial production was up only 1.4 percent from June 1985 to June 1986. Real GNP mirrored this production sluggishness, along with little inventory building and a downturn in investment spending in 1986. Leading indicators suggest continued moderate growth.

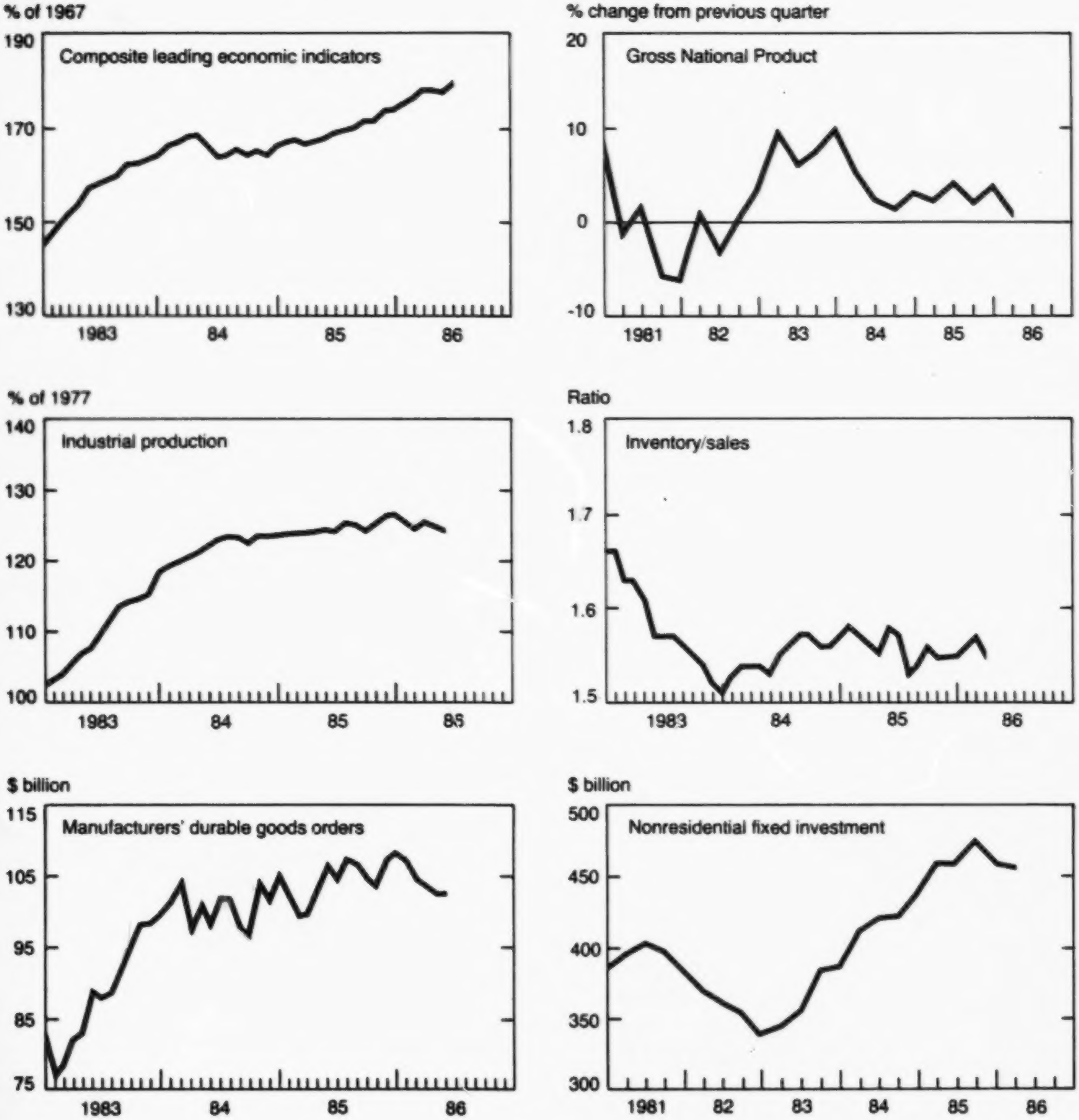


Chart 138

General Economic Indicators: Personal Economy

Inflation and interest rates in 1986 fell from their mid-1985 levels. Unemployment rates have remained near 7.1 percent since mid-1985, while real personal income and expenditures have risen. The savings rate recovered from its September 1985 3.9-percent low.

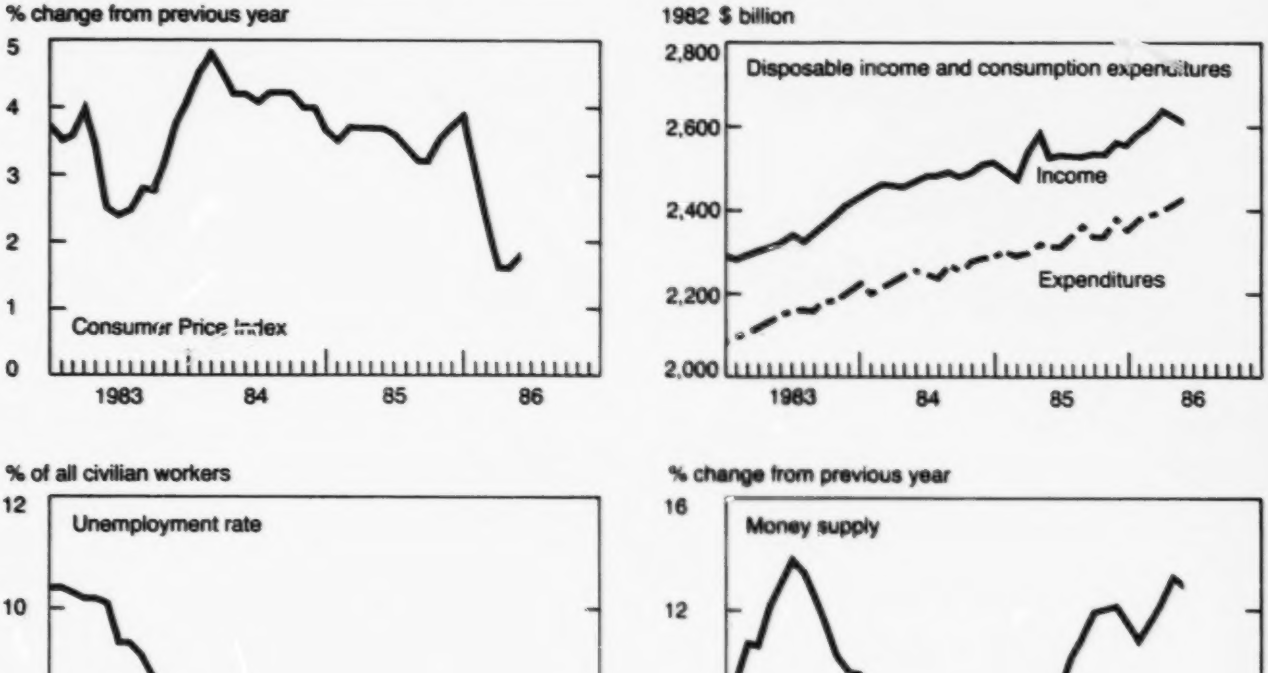
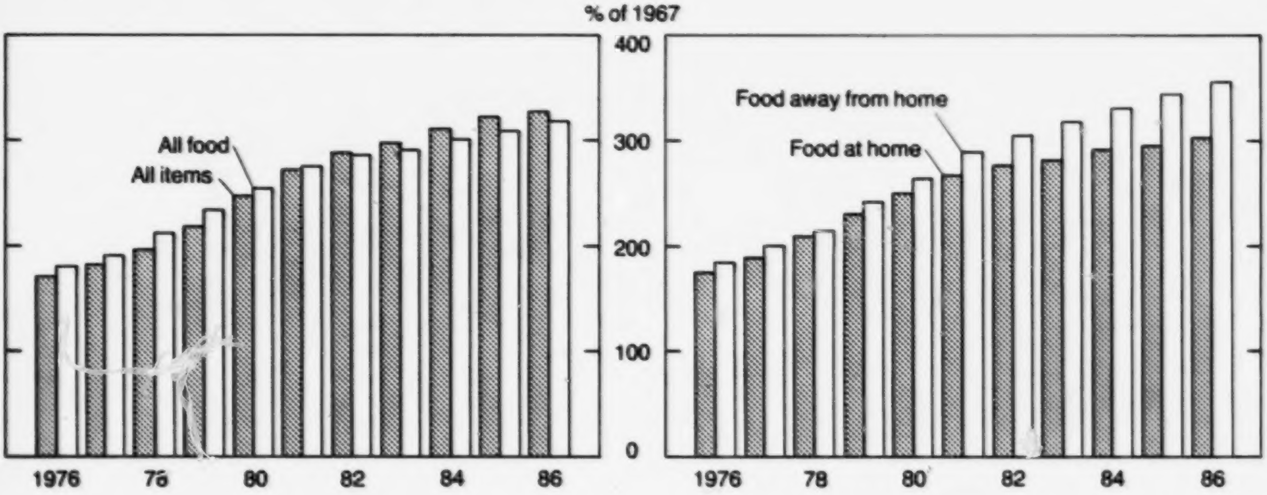


Chart 139

Consumer Price Index for Food

Food prices rose 2.3 percent in 1985 and continue to rise slowly in 1986. Food prices have risen less than the general inflation rate for 7 consecutive years. The cost of food away from home rose 4 percent in 1985, while food purchased in grocery stores for consumption at home rose 1.4 percent.

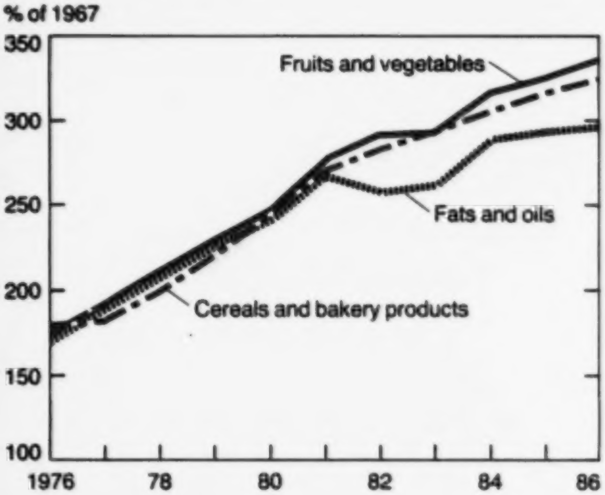


1986 forecast. Source: Bureau of Labor Statistics.

Chart 140

Consumer Price Index for Selected Crop Products

Fresh fruit prices rose 10.1 percent in 1985 because of fewer supplies. Smaller vegetable acreage in 1986 will reduce fresh vegetable supplies and prices will rise.

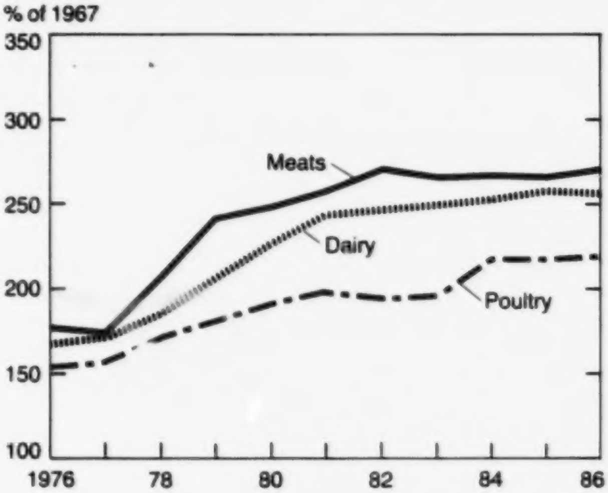


1986 forecast. Source: Bureau of Labor Statistics.

Chart 141

Consumer Price Index for Selected Livestock Products

Large supplies of meat dropped prices 1 percent in 1985. Lower farm prices for milk in 1985 and 1986 have kept increases in retail prices for dairy products low.

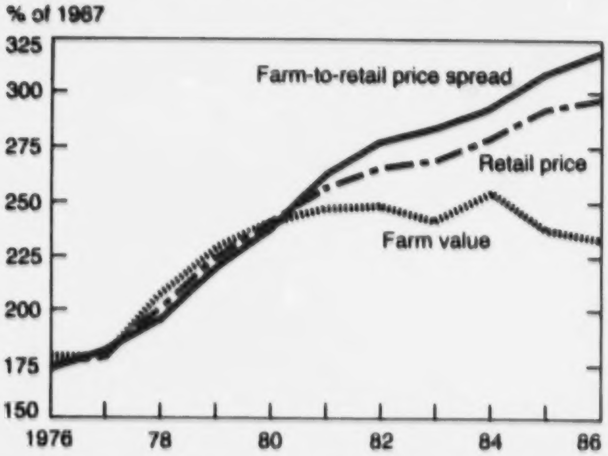


1986 forecast. Source: Bureau of Labor Statistics.

Chart 142

Retail Price, Farm Value, and Price Spread for Food

Farm value of food fell in 1986, mainly because of lower farm prices for crop products. Retail food prices rose slightly due to higher processing and distribution charges.

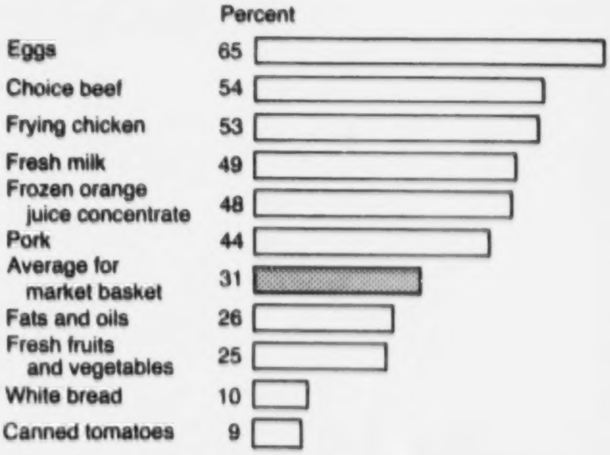


Data for a market basket of foods sold in retail stores. Retail price is that paid by consumers. Farm value is prices received by farmers for commodities. Price spread represents all charges for processing and distribution.

Chart 143

Farm Value Share of Retail Food Prices

Farm value as a share of the retail price averaged 31 percent for all foods in the market basket in 1985, down from 34 percent in 1984.

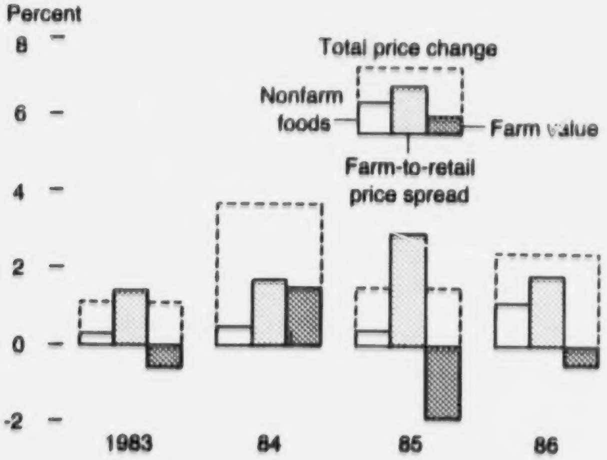


1985 data. Farm value share of the proportion the farmer receives from the dollar the consumer spends. The remainder of the dollar goes to marketing firms.

Chart 144

Components of Increases in Retail Food Prices

Increases in the farm-to-retail price spread have accounted for most of the rise in retail food prices in recent years.

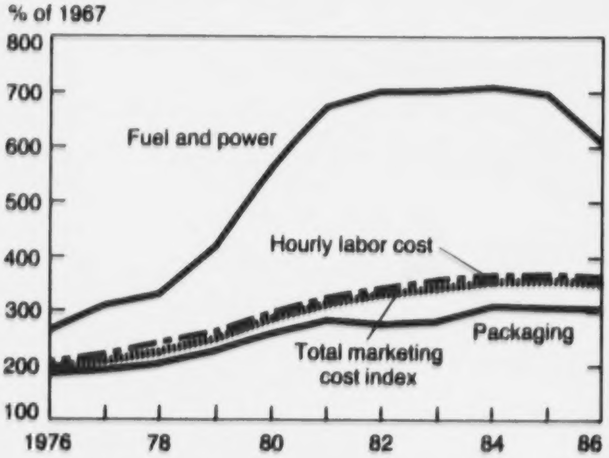


1986 forecast. Total price change is food-at-home index, Consumer Price Index. Bars represent contribution of factors to price change. Nonfarm includes nonalcoholic beverages, seafoods, coffee, and other imported foods.

Chart 145

Food Processing, Wholesaling, and Retailing Costs

Labor costs and prices of principal inputs used by the food industry fell in 1986 reflecting lower wage bases, falling oil prices, and low overall inflation.



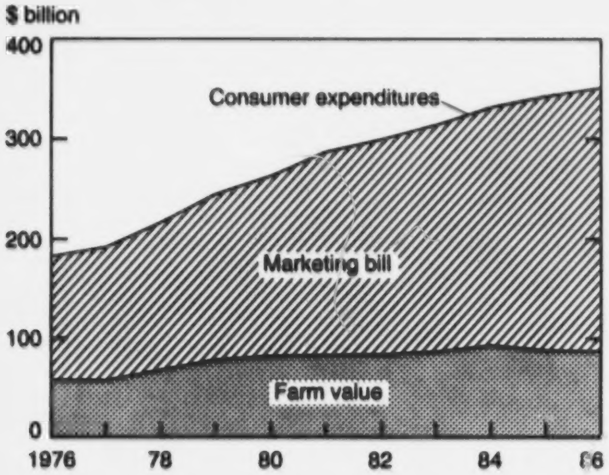
1986 forecast. The marketing cost index measures changes in worker wages, salaries, and supplemental benefits, and prices of purchased inputs such as packaging materials and fuel and power.

Food Marketing Costs

Chart 146

Marketing Bill, Farm Value, and Consumer Expenditures for Farm Foods

The marketing bill, the largest share of the food dollar, has risen faster than the cost of raw foodstuffs, reflecting the high cost of labor, packaging, and other inputs.

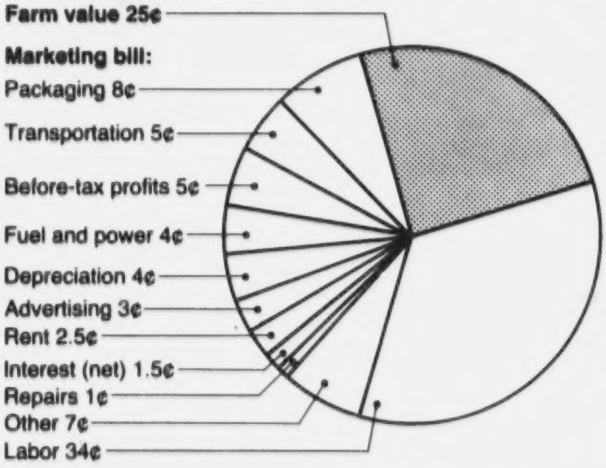


1986 forecast. Data for domestically produced farm foods purchased by civilian consumers for consumption both at home and away from home.

Chart 147

What a Dollar Spent on Food Paid for in 1985

Labor accounts for just over one-third of the food dollar. About 10.8 million workers were employed in food marketing industries in 1985.

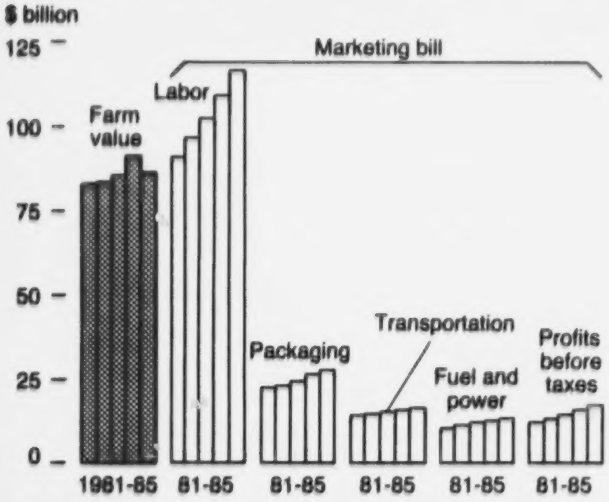


1985 preliminary. Other costs include property taxes and insurance, accounting and professional services, promotion, bad debts, and miscellaneous items.

Chart 148

Components of Consumer Expenditures for Farm Foods

Labor showed the largest increase of the major cost components for farm foods, about equal to the percentage increase in the marketing bill.

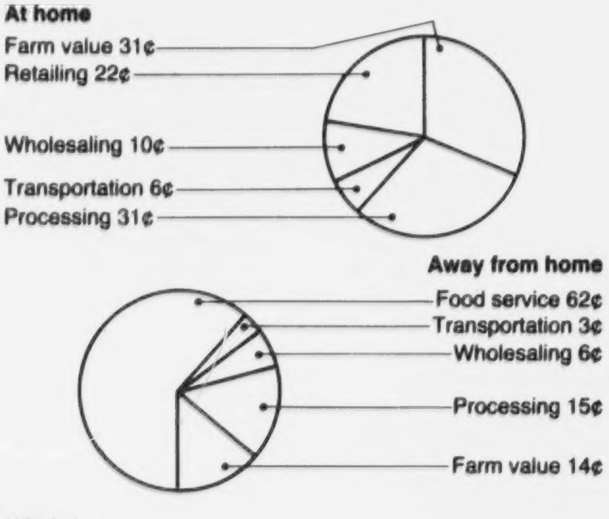


1985 preliminary. Major marketing components only.

Chart 149

Where the Food Dollar Goes At Home and Away

Farm value as a percentage of the total food dollar is lower for the away-from-home market due to added costs of preparing and serving food.



1985 data.

Chart 150

Per Capita Consumption of Food

The increase in the price-weighted food consumption index reflects both a larger volume of food consumed and a shift to higher priced items.

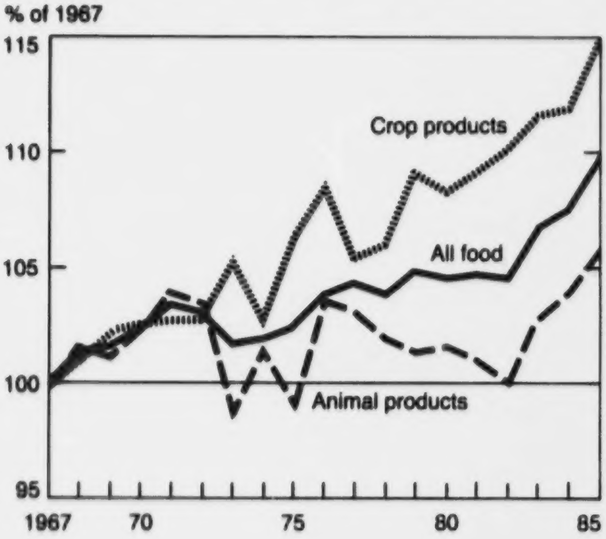


Chart 151

Per Capita Consumption of Beverages

Milk consumption rose slightly in 1985 after falling 15 percent since 1967. Soft drink consumption has more than doubled in the last 15 years.

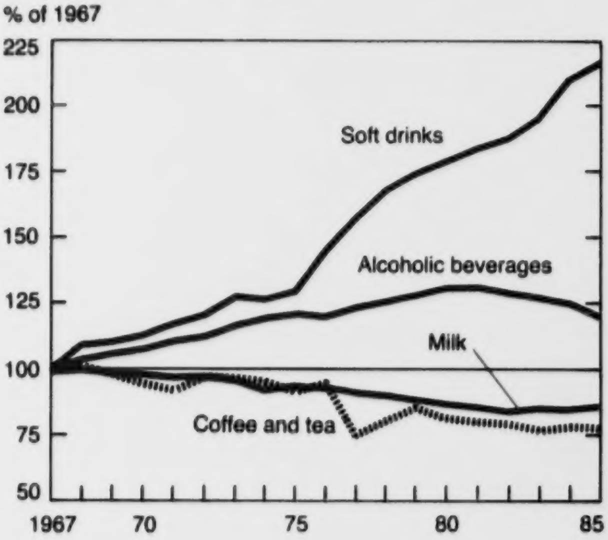


Chart 152

Per Capital Consumption of Selected Animal Products

Poultry consumption has risen 54 percent since 1967, the fastest of all animal products. Egg consumption has fallen 21 percent since 1967.

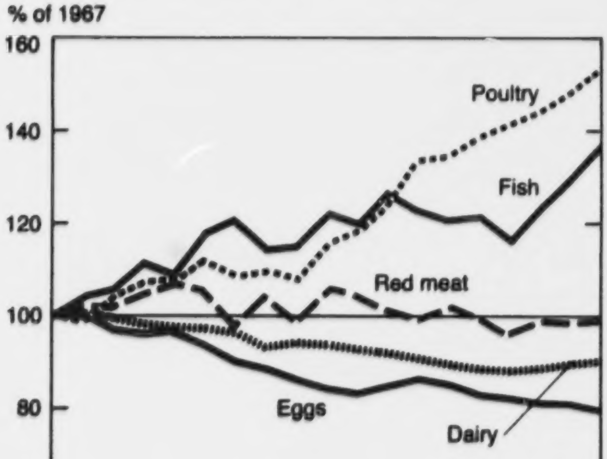
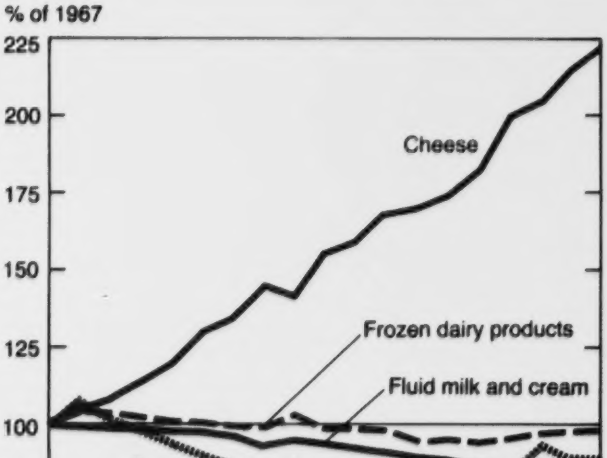


Chart 153

Per Capita Consumption of Selected Dairy Products

While consumption of most dairy products has fallen or remained constant, cheese consumption has risen 120 percent since 1967.



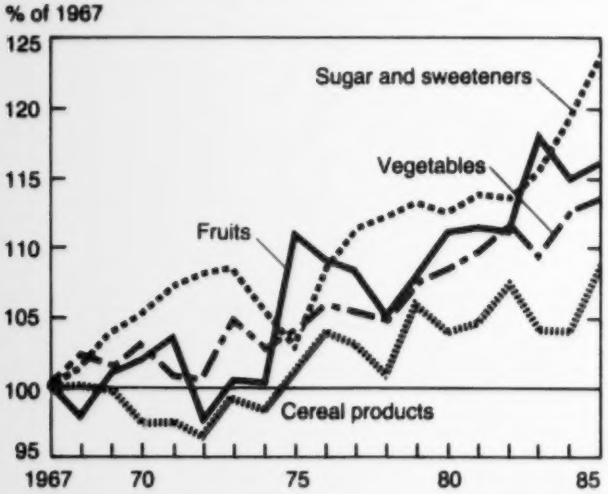
Note: Food consumption charts are based on food available for consumption, not adjusted for waste beyond the retail level.

57

Chart 154

Per Capita Consumption of Selected Crop Products

Consumption of most major crop products rose in 1985. Sugar and sweeteners, the fastest rising crop product other than vegetable oils, rose 4.5 percent.

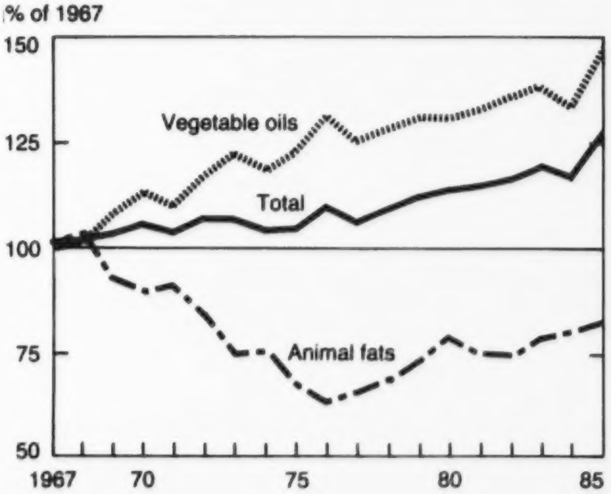


Vegetables include potatoes, peas, beans, and melons.

Chart 155

Per Capita Consumption of Fats and Oils

Vegetable oils use rose 10 percent in 1985 after falling in 1984. Animal fat consumption also rose, pushing total fats and oils to a record high.



Animal fats include butter.

Chart 156

Per Capita Consumption of Flour and Cereal Products

Flour and cornmeal products use has risen since 1974 after a long decline. Rice consumption in 1985 was 25 percent above the 1967 level.

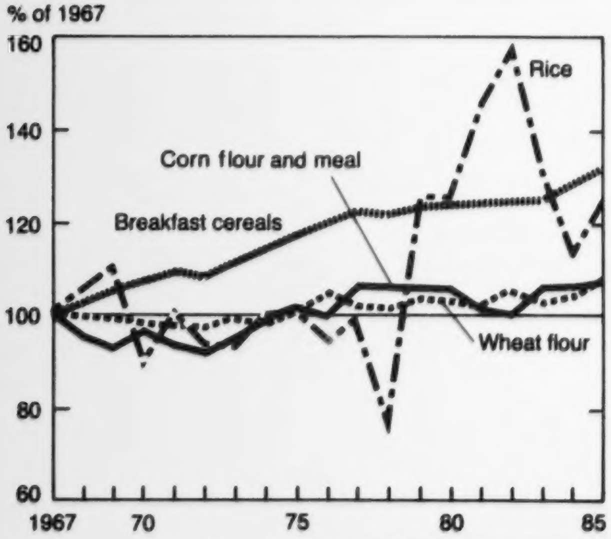
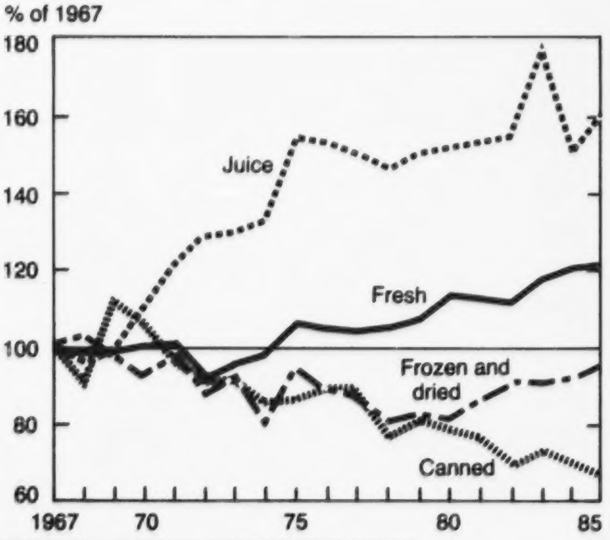


Chart 157

Per Capita Consumption of Fruits

Juice consumption has fallen 9 percent since 1983 but is still 61 percent higher than in 1967.



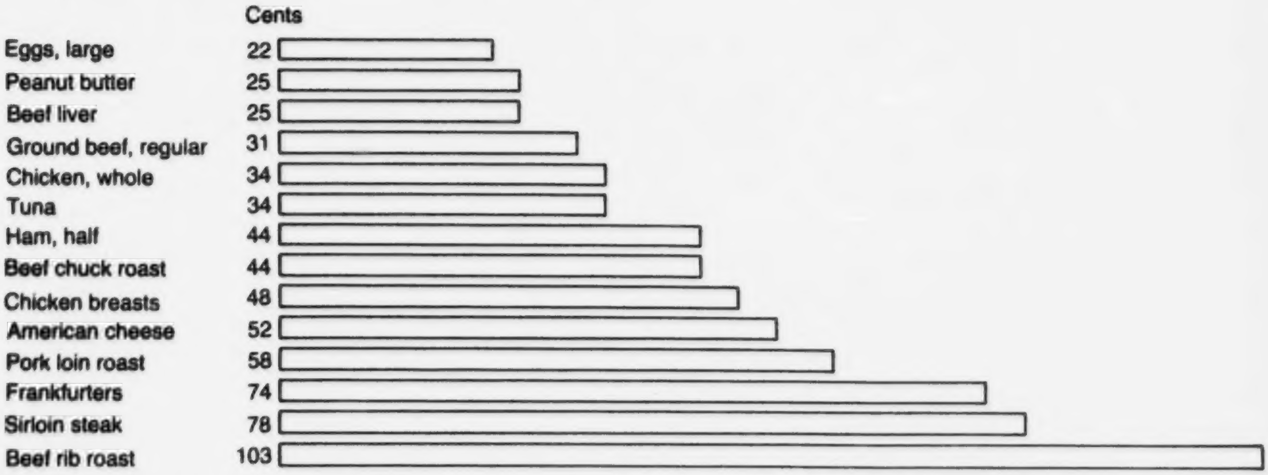
Note: Food consumption charts are based on food available for consumption, not adjusted for waste beyond the retail level.

Family Food Costs

Chart 158

Cost of One-Third of a Day's Protein from Meats and Meat Alternates

Three ounces of cooked lean meat, poultry, or fish provide about one-third of a day's recommended protein. Consumers can find good buys by comparing the cost of equal amounts of protein. Much more of some meats or alternates is needed for the same amount of protein.

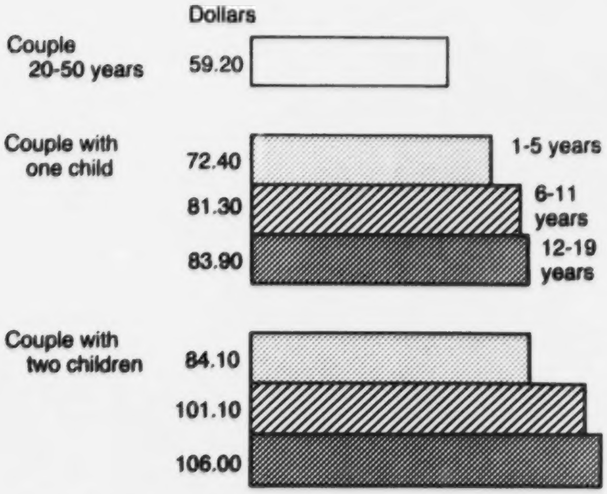


One-third of Recommended Dietary Allowance for adult males. Based on June 1986 average U.S. retail prices from the Bureau of Labor Statistics, U.S. Department of Labor.

Chart 159

A Family's Weekly Food Cost

The cost of food at home varies by the number of people in the household and their ages.

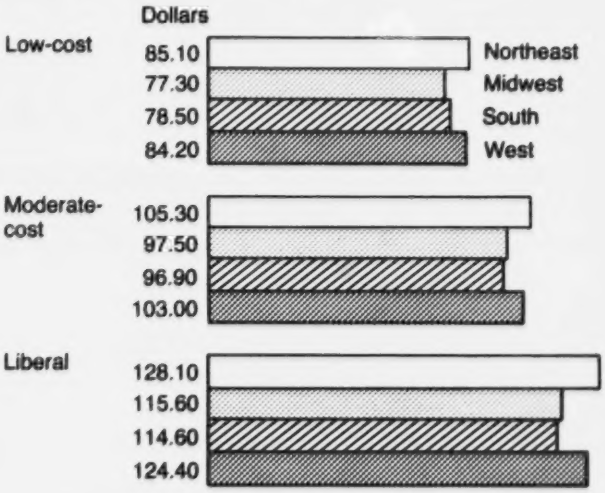


January 1986 data. Moderate-cost plan.

Chart 160

Cost of a Week's Food for a Family of Four by Region

Food costs generally were higher in the Northeast and West and lower in the South and Midwest. USDA food plans assume that all food is purchased at stores and prepared at home.



January 1986 data. Man and woman 20-50 years and two children 6-11 years.

Chart 161

Vitamin E in the U.S. Food Supply

The level of vitamin E available in the American food supply rose from 10.0 mg per capita per day in 1909-13 to 16.6 mg in 1984.

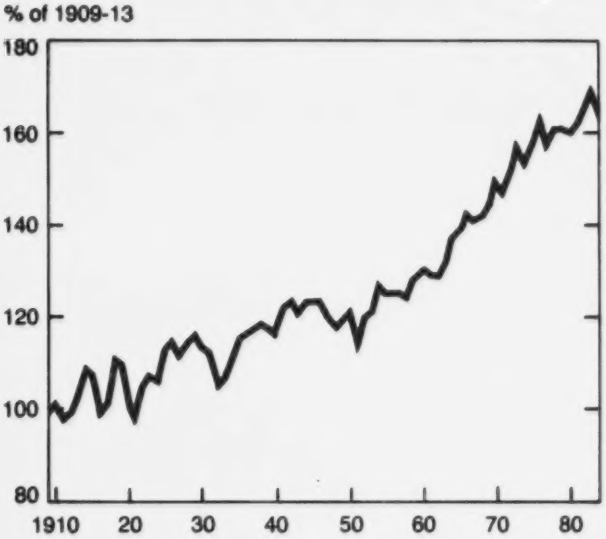
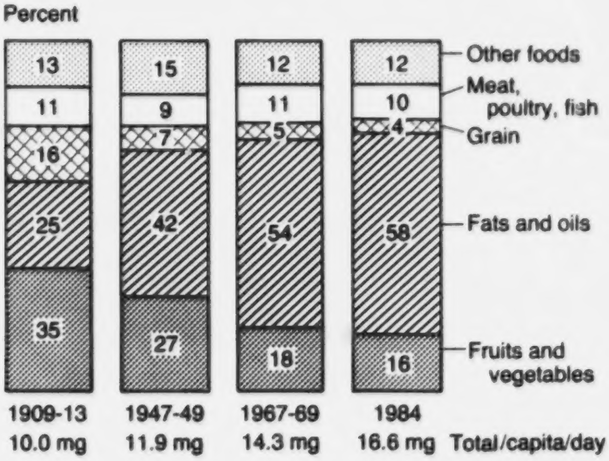


Chart 162

Vitamin E from Major Food Groups

Fats and oils were the major source of vitamin E for most years. The decline in the proportion of vitamin E from fruits and vegetables was mainly due to decreased potato use.

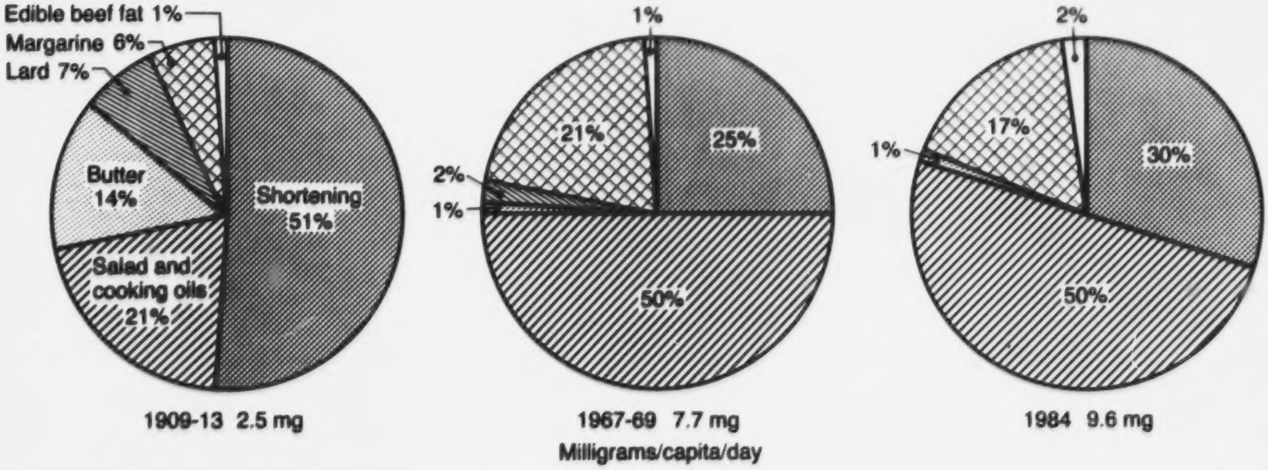


Fruits and vegetables include potatoes and sweet potatoes. Other foods include dairy products, eggs, dried beans, peas, nuts and soy products, sugar and sweeteners, and miscellaneous.

Chart 163

Vitamin E from Fats and Oils

Among fats and oils, shortening was the main source of vitamin E during 1909-13. After 1925-29, salad and cooking oils were the leading source.

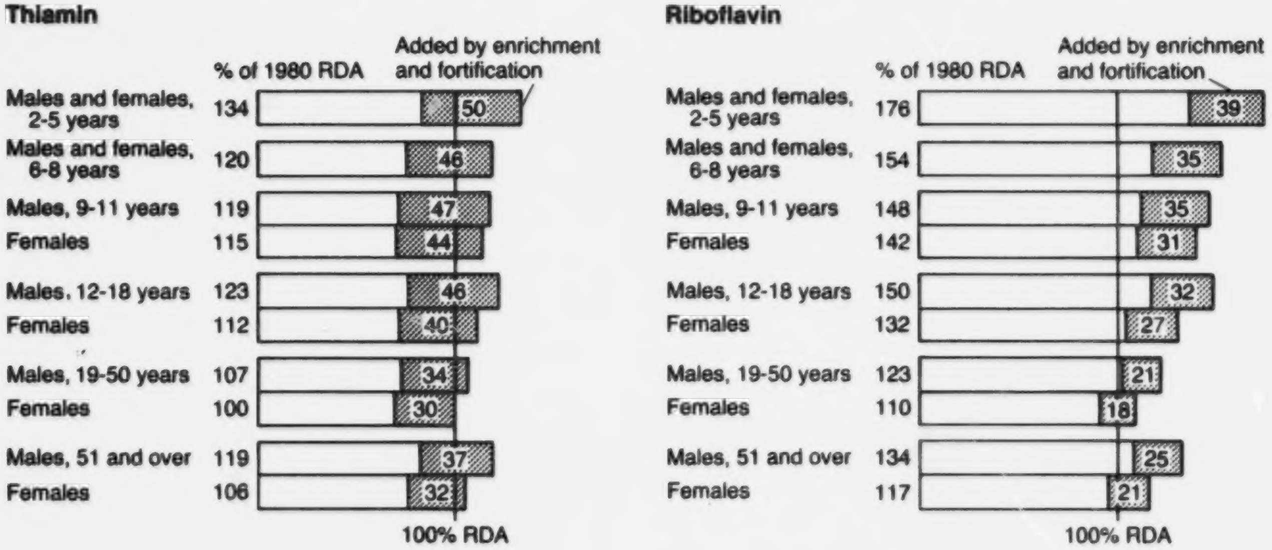


Margarine and shortening exclude small amounts of lard and edible beef fat. Lard in 1984 represented less than 1.0 percent.

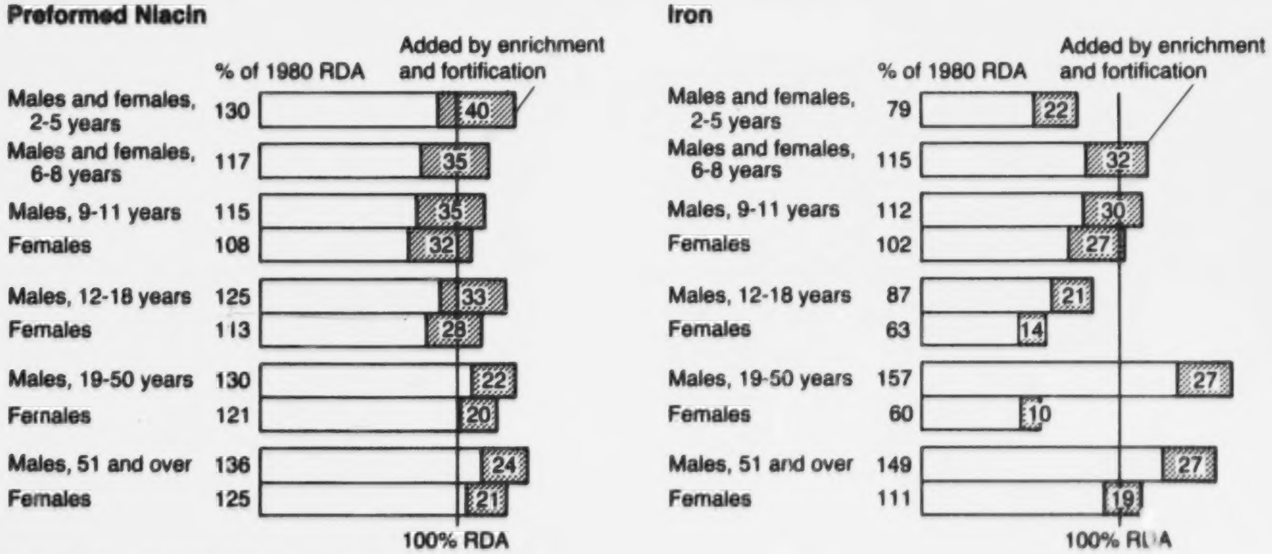
Chart 164

Nutrient Intake Provided by Grain Enrichment and Fortification

Without nutrients added to grain products, the following sex-age groups would not have met 1980 RDA: All groups for thiamin; adult females for riboflavin; males and females 2-18 for niacin; and males 2-18 and all females for iron.



With nutrients added to grain products, all groups studied met their RDA for thiamin and riboflavin (see above) and niacin (below), but children 2-5, males 12-18, and females 12-50 still failed to meet RDA for iron. Added nutrients contributed more to diets of children than adults.



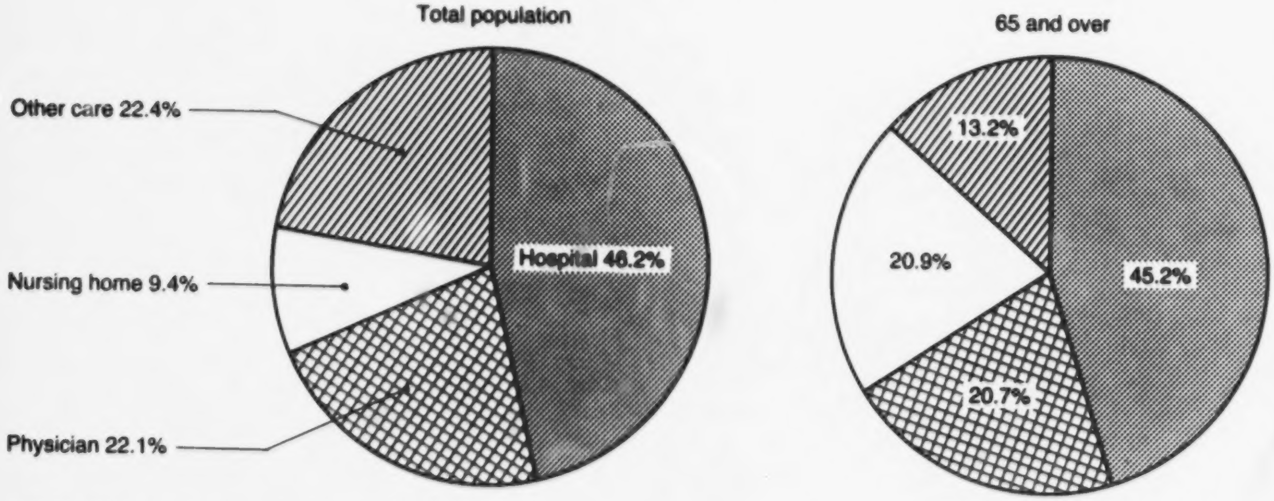
Does not include niacin which may be formed from dietary protein.

RDA is Recommended Dietary Allowance. Source: 1977-78 Nationwide Food Consumption Survey.

Chart 165

Personal Health Care Expenditures by Age

Compared to the general population, the elderly spent a smaller share of their health care dollar on dentists' services, prescription drugs, and vision aids (other care) in 1984.

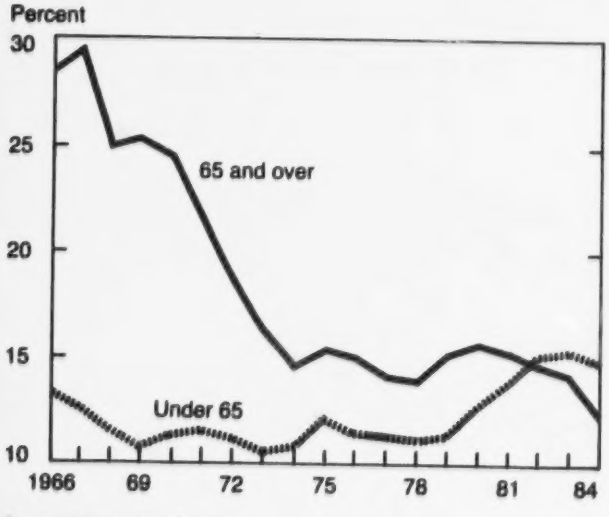


1984 data. Source: Health Care Financing Administration.

Chart 166

Poverty Rates by Age

Double-digit inflation and falling real income during 1979-82 led to higher poverty rates for persons under 65 than for the elderly.

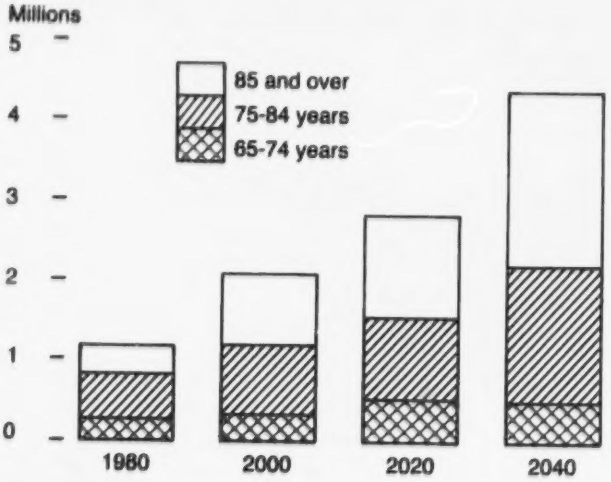


Source: Bureau of the Census.

Chart 167

Nursing Home Population Projections

The number of elderly residing in nursing homes should triple by 2040. Their median age is expected to rise as 50 percent become 85 and over in 2040.

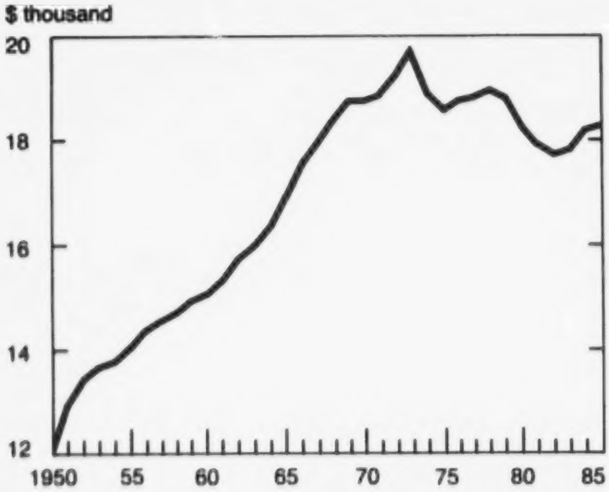


Sources: Bureau of the Census and the 1977 National Nursing Home Survey, National Center for Health Statistics.

Chart 168

Real Wage and Salary Income per Civilian Employee

After steady gains throughout the 1950's and 1960's, real wage and salary income peaked in 1973 at $19,705, and then declined until 1982.

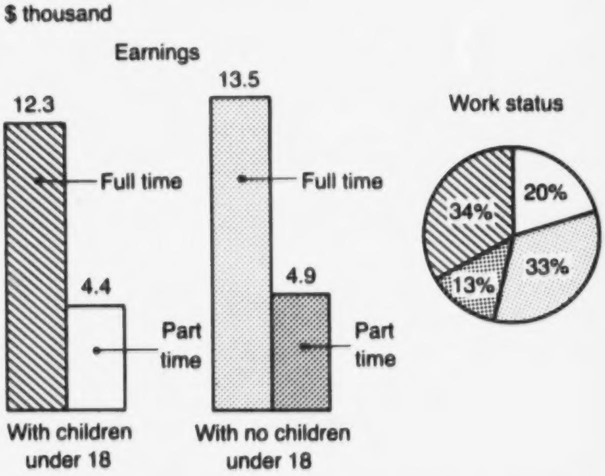


Sources: Bureau of Economic Analysis and Bureau of Labor Statistics.

Chart 169

Earnings and Work Status of Wives in the Labor Force

In 1983, over half of wives with earnings had children under 18. The earnings of these wives were only slightly lower than those of wives with no children.

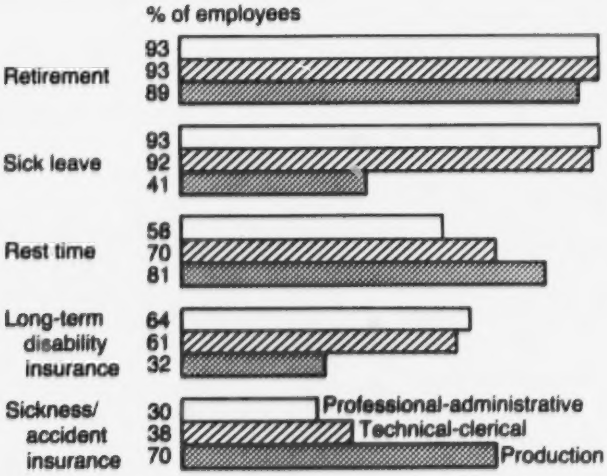


1983 data. Average annual earnings; excludes wives with no 1983 earnings. Source: Bureau of the Census.

Chart 170

Employee Benefits

Over 95 percent of all full-time employees receive paid holidays and vacations and participate in group health and life insurance plans.

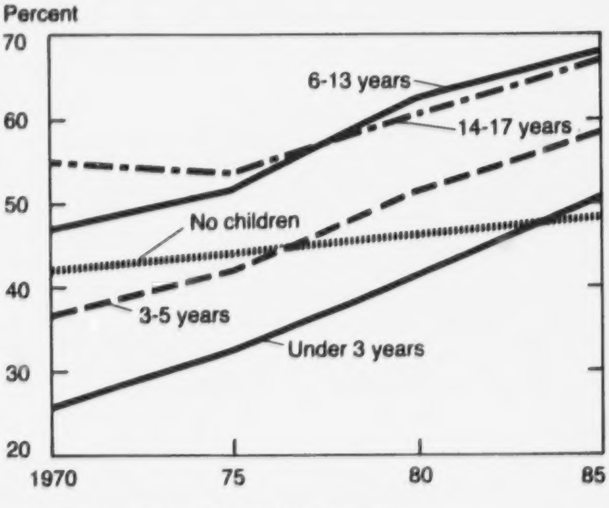


1985 data. Full-time employees in private industry. Source: Bureau of Labor Statistics.

Chart 171

Wives' Labor Force Participation Rates by Age of Youngest Child

Labor force participation rate for wives with children under 3 doubled during 1970-85, and was higher in 1985 than that for wives with no children.

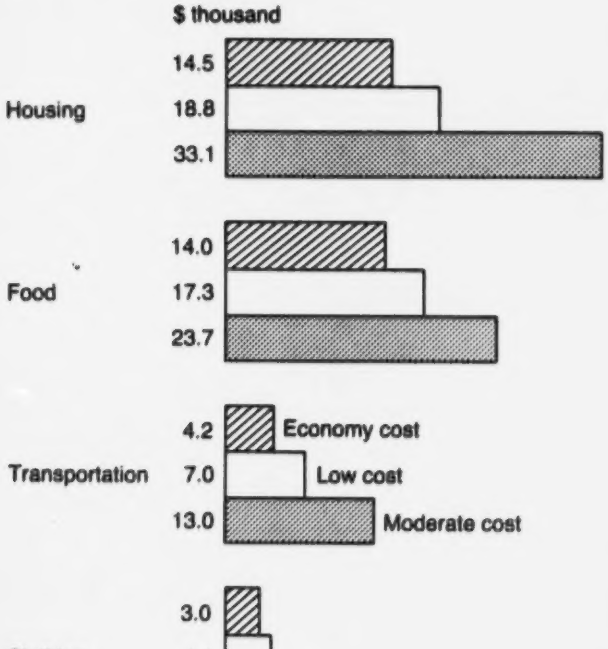


Husband present. Source: Bureau of Labor Statistics.

Chart 172

Cost of Raising Northeastern, Urban Children

Raising Northeastern, urban children through age 18 cost $43,252, $56,593, and $96,934 at the economy, low, and moderate levels of living, respectively.

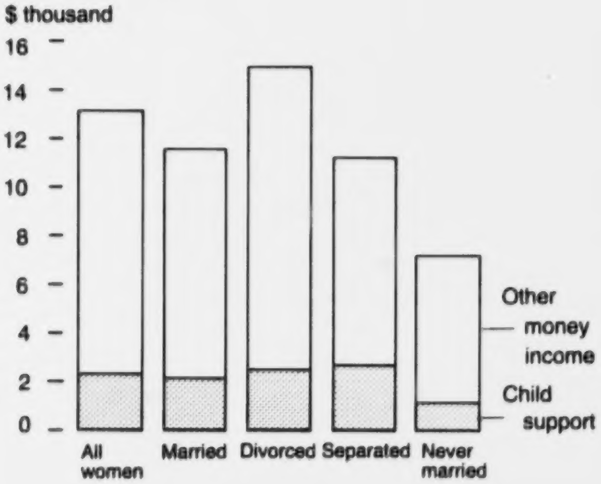


June 1986 data. Birth to age 18.

Chart 173

Child Support Payments Received

Average child support received in 1983 varied from $1,132 or 16 percent of income for never married women to $2,682 or 24 percent for separated women.

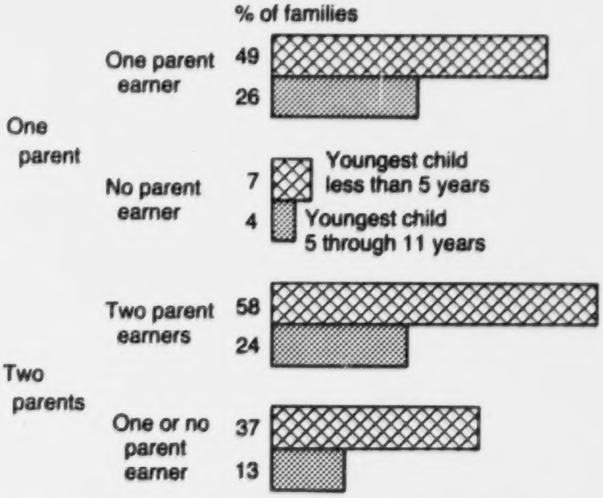


1983 data. Annual averages actually received. Source: Bureau of the Census.

Chart 174

Families Incurring Child Care Expenditures

Families in which the youngest child is under 5 years and those in which all parents report earnings were most likely to incur child care expenses.

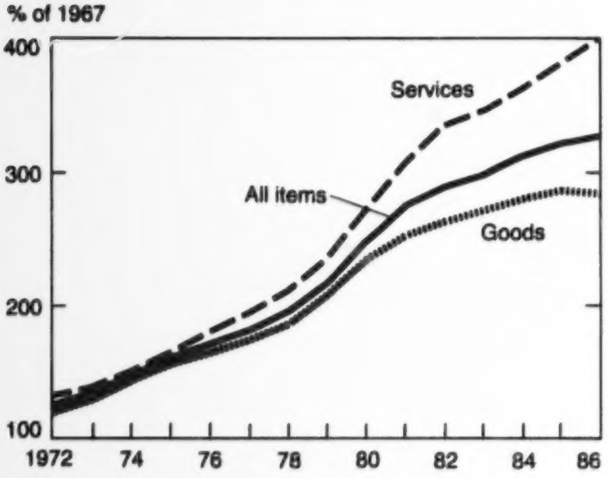


Source: 1980-81 Consumer Expenditure Survey, Bureau of Labor Statistics.

Chart 175

Changes in Consumer Prices for Goods and Services

Prices for services continued to increase to an annual rate of about 5 percent in 1985. Prices for goods increased only 2 percent in 1985 and decreased slightly by mid-1986.

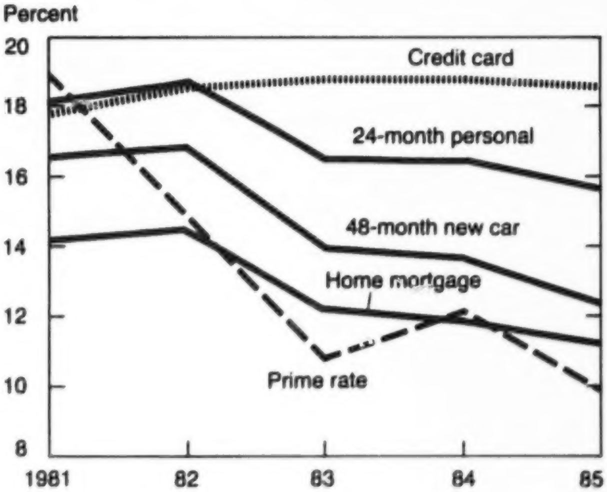


Annual averages 1972-85; June data for 1986. Source: Bureau of Labor Statistics.

Chart 176

Loan Rates

Except for credit card rates, consumer loan rates have fallen since 1982. Prime rate, charged by banks on most short-term business loans, dropped by 18 percent from 1984 levels.

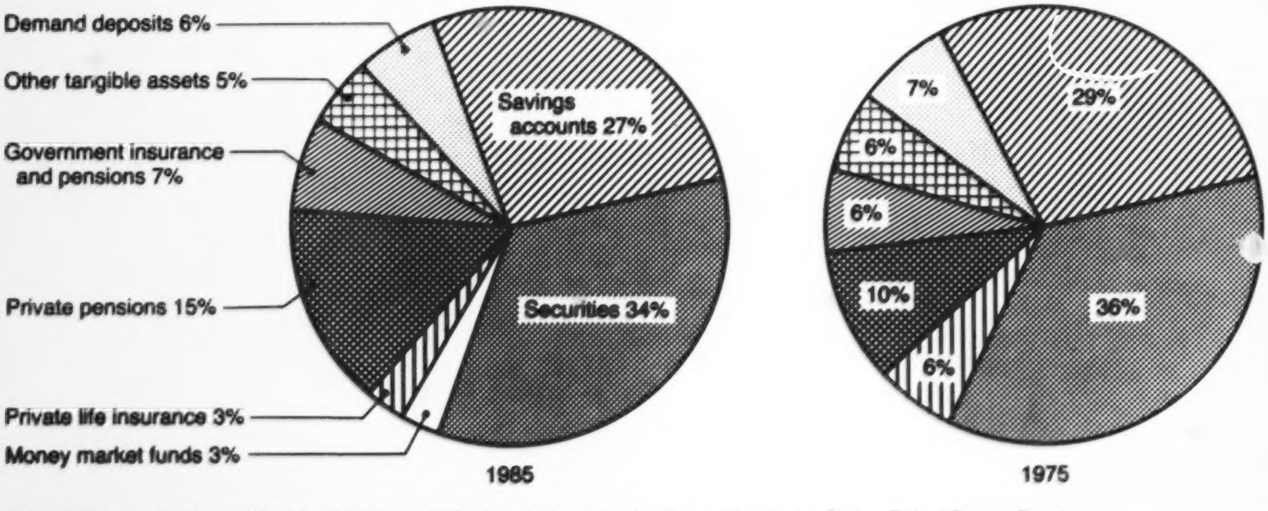


Annual averages. Source: Federal Reserve Bulletin.

Chart 177

Distribution of Financial Assets

In 1985, individuals held 67 percent of their financial assets in securities, savings accounts, and demand deposits, down from 72 percent in 1975. The proportion of assets in private pensions and money market funds increased during this period.



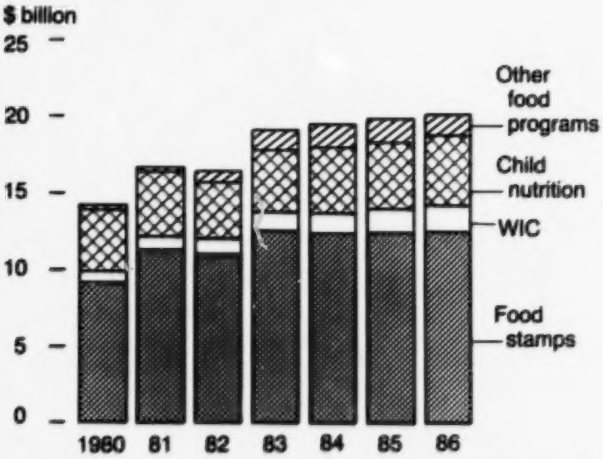
Other tangible assets include residential and nonresidential fixed assets, consumer durables, and inventories. Source: Federal Reserve Board.

Food and Nutrition Programs

Chart 178

USDA Costs for Food Assistance

Growth of USDA food assistance programs and increased benefits have resulted in 1986 expenditures about 41 percent greater than in 1980.

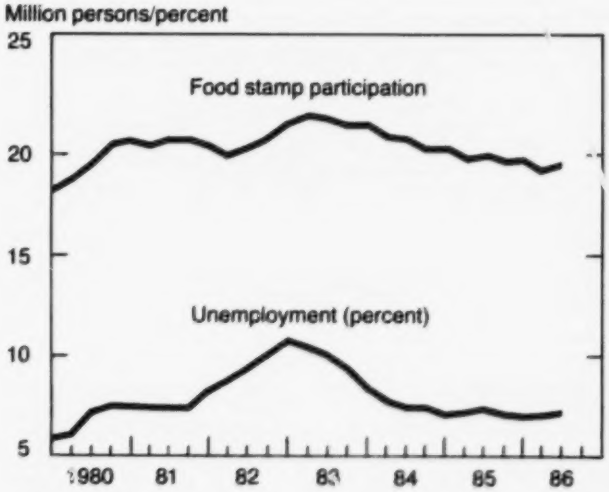


1986 estimated. Fiscal years. Other programs include administrative costs and surplus commodities. Food stamps include cash assistance for Puerto Rico. WIC is Women, Infants, and Children Program.

Chart 179

Unemployment Rate and Participation in the Food Stamp Program

Participation in the Food Stamp Program traditionally is strongly associated with changes in the unemployment rate.

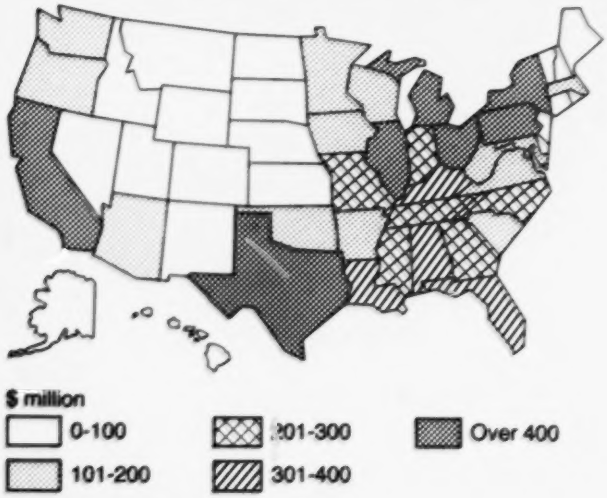


1986 estimated. Seasonally adjusted fiscal year data.

Chart 180

Expenditures for Food Assistance for the Food Stamp Program by State

Level of assistance under the Food Stamp Program depends on a State's population and economic condition. Thirty States received more than $100 million in fiscal 1985.

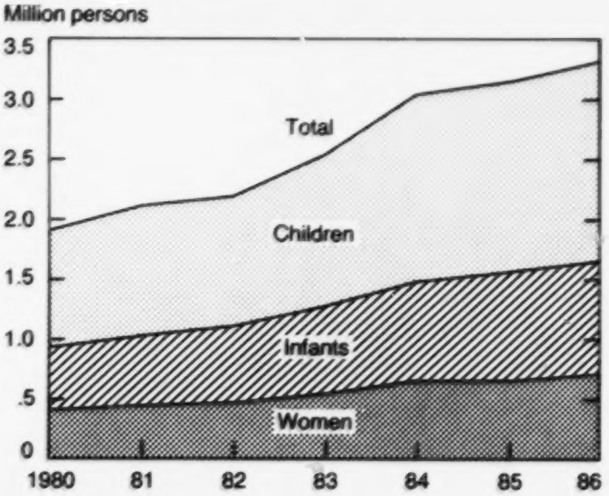


1985 fiscal year data.

Chart 181

Participants in the WIC Program

A record high 3.3 million persons participated in the WIC Program in fiscal 1986. The number of participating infants has increased the fastest in recent years.

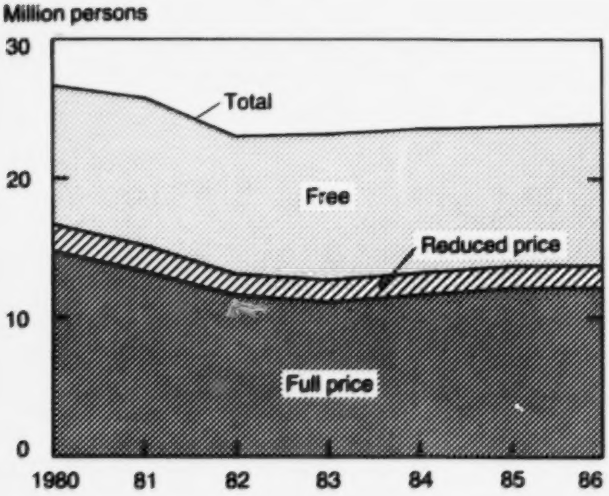


1986 estimated. Fiscal years.

Chart 182

Children in the National School Lunch Program

National School Lunch Program participation rose 0.6 percent during the 1985-86 school year, with the largest increase in full price participants.

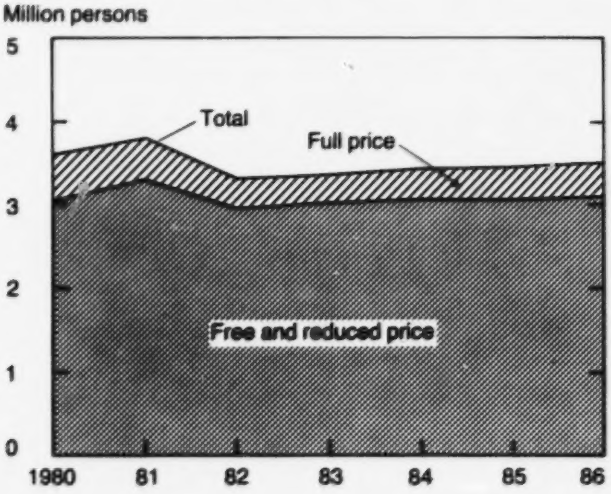


1986 estimated. Fiscal years.

Chart 183

Children in the School Breakfast Program

Participation in the School Breakfast Program rose for the fourth straight year, up about 1.5 percent during the 1985-86 school year.

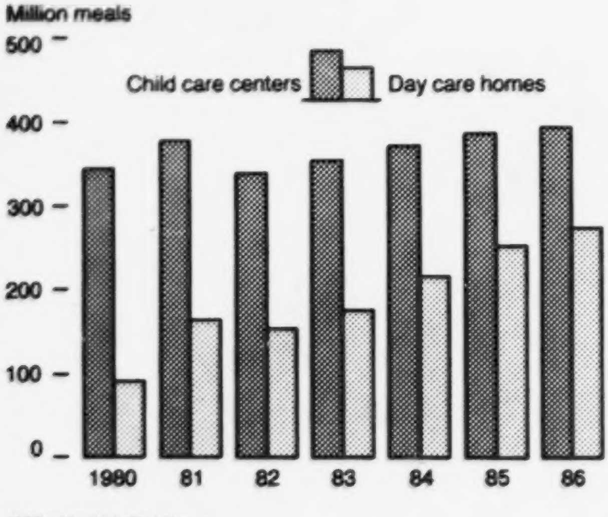


1986 estimated. Fiscal years.

Chart 184

Meals Served in the Child Care Food Program

The number of meals served under the Child Care Food Program in both child care centers and day care homes reached record highs in 1986.

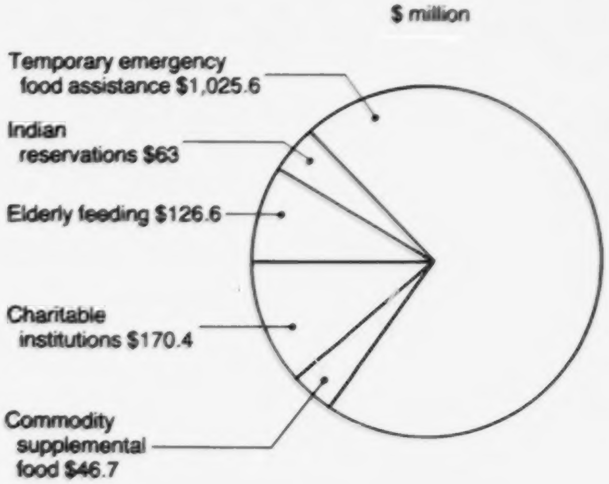


1986 estimated. Fiscal years.

Chart 185

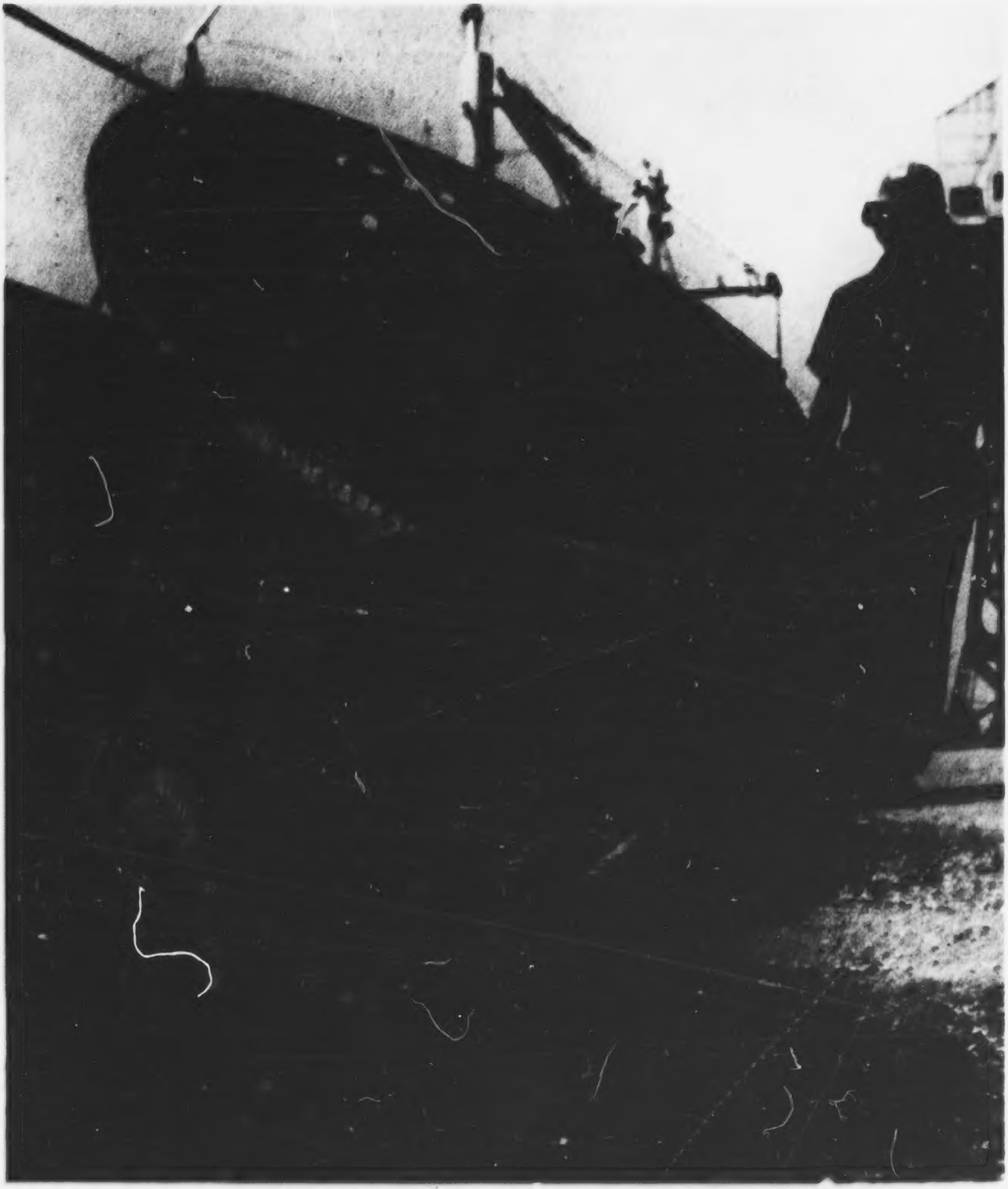
Food Donation Costs

Over $1.4 billion of food was donated under various food distribution programs during fiscal 1986, over $1 billion under the Temporary Emergency Food Assistance Program.



1985 preliminary fiscal year data. Excludes Child Nutrition Programs.

U.S. Trade and World Production

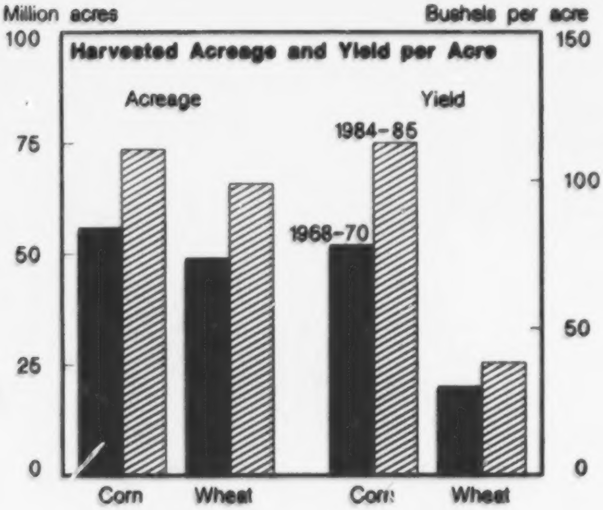


A Look at Farm Trade

American agriculture increased its dependence on foreign markets dramatically during the 1970's. The result was a sixfold increase in U.S. farm exports, from $7.3 billion in 1970 to $43.3 billion in 1981. The situation changed rapidly, however, after 1981.

(A)

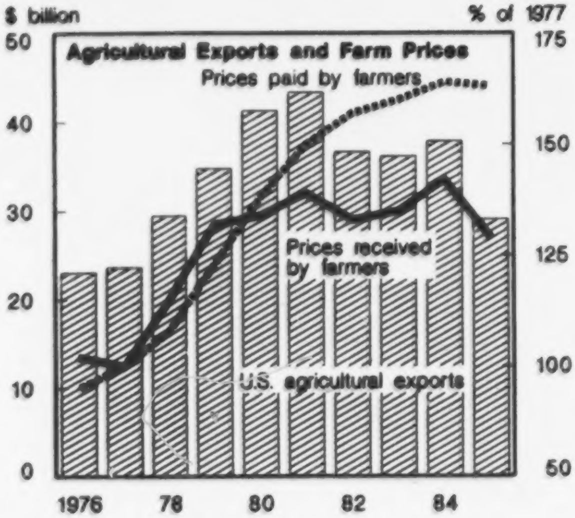
U.S. farmers committed more land and yield-increasing capital to meeting overseas demand during the 1970's.



Harvested Acreage and Yield per Acre

(B)

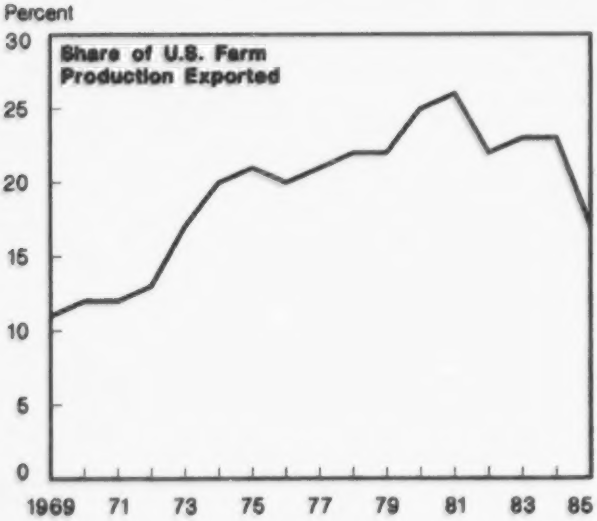
Export expansion bid up the price of farm output (prices received) during the 1970's. In contrast, input costs (prices paid) such as farm wages and pesticides are not as affected by export patterns and have continued to rise regardless of export volume.



Agricultural Exports and Farm Prices

(C)

The percentage of domestic production exported doubled from 1970 to 1981, peaking in 1981, with 26 percent of U.S. agricultural production exported.



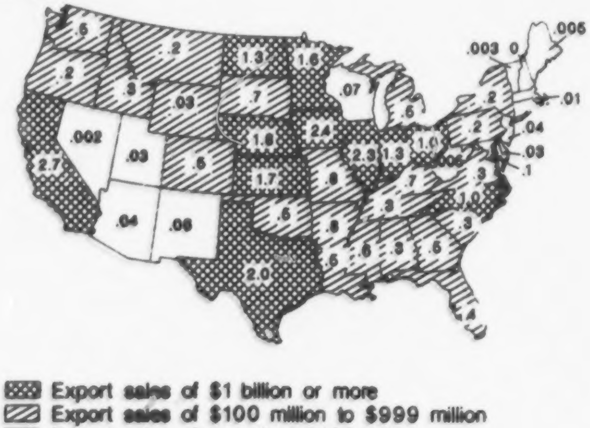
Share of U.S. Farm Production Exported

(D)

All States did not share equally in export growth of the 1970's or the decline of the 1980's. Illinois and Iowa are perennially the largest farm export States, but California took the lead in 1985.

Fiscal 1985 Export Sales

$ billion

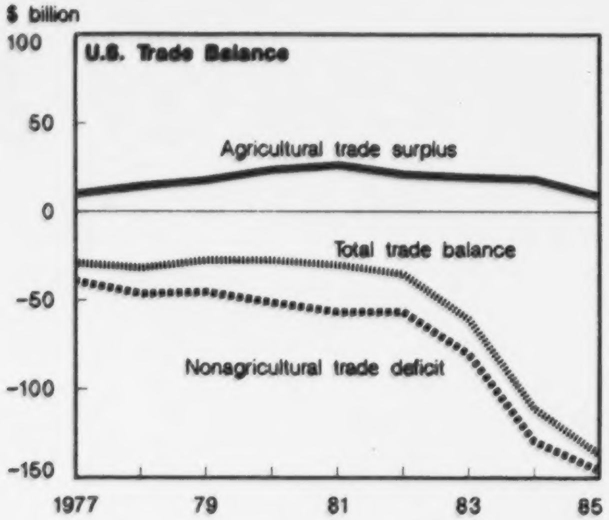


▩ Export sales of $1 billion or more
▨ Export sales of $100 million to $999 million
☐ Export sales of less than $100 million

Hawaii: $35.7 million.

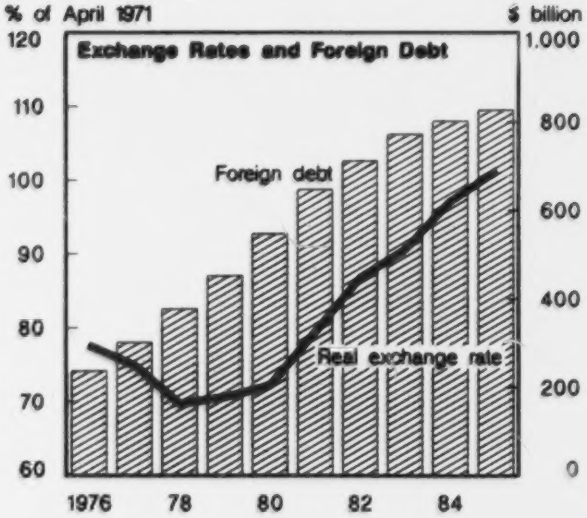
(E)

Farm exports have deteriorated rapidly since 1981. The agricultural trade surplus, although faring better than the overall trade balance, has dropped close to $9 billion from a 1981 high of $26.6 billion.



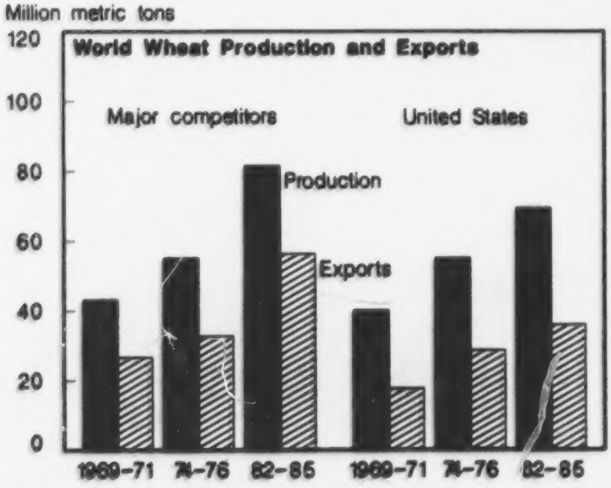
(F)

A strong dollar and high foreign debt have hurt U.S. exports. The appreciation of the dollar as reflected in the real exchange rate made our exports more expensive, while foreign debt reduced the amount of income available to purchase U.S. products.



(G)

In the wheat market, for example, the strong dollar meant that our major competitors could underprice us, allowing them to expand both production and exports.



Major competitors are Canada, Australia, Argentina, and France.

(H)

The short-term outlook for U.S. farm exports is for some improvement as loan rates are lowered under 1985 farm legislation and the dollar depreciates.

Outlook for U.S. Agricultural Exports

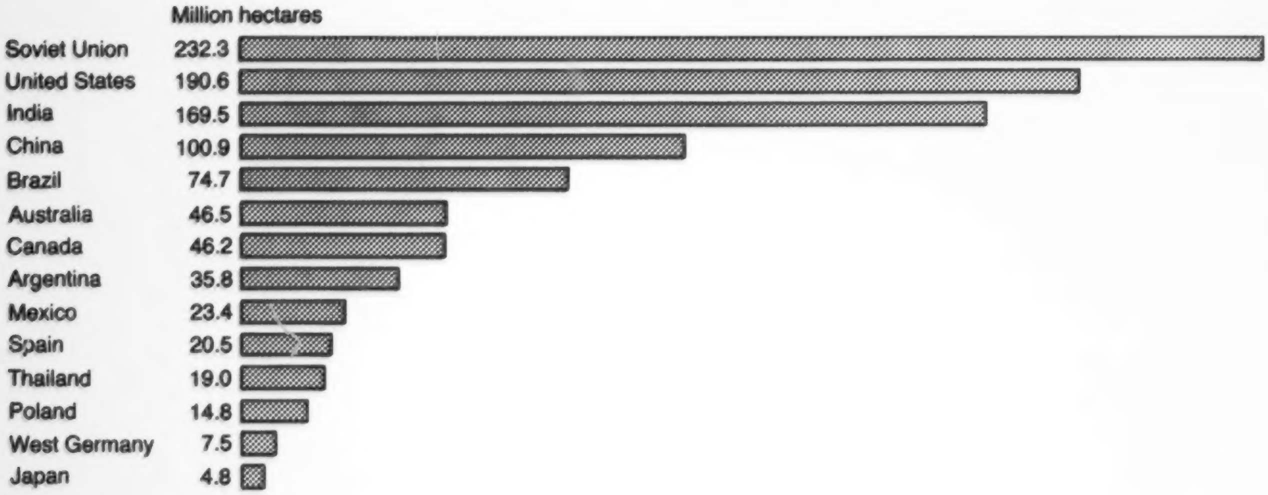
Item	1981/82	82/83	83/84	84/85	85/86	86/87
	Million metric tons					
Wheat	48.2	41.1	38.9	38.8	24.9	31.3
Corn	51.1	46.6	48.3	47.4	31.1	39.4
Sorghum	6.6	5.3	6.2	7.5	4.4	6.1
Rice	2.7	2.2	2.3	2.0	1.8	2.6
Soybeans	25.3	24.6	20.2	16.3	20.4	20.7
Soybean meal	6.3	6.4	4.9	4.5	5.6	5.2
Cotton	1.4	1.1	1.5	1.5	.4	1.4

1986/87 forecast.

Chart 186

Arable and Permanent Cropland in Selected Countries

Arable land is that under crops which must be planted each year, and includes land left fallow. Permanent cropland grows crops such as rubber, coffee, and fruit trees, which are not replanted after each harvest.



1982 data. Source: Food and Agriculture Organization Production Yearbook.

Chart 187

Population Growth Rates

Population growth significantly affects a country's import demand for agricultural commodities, particularly commodities like wheat and rice, which are used for human consumption after minimal processing.

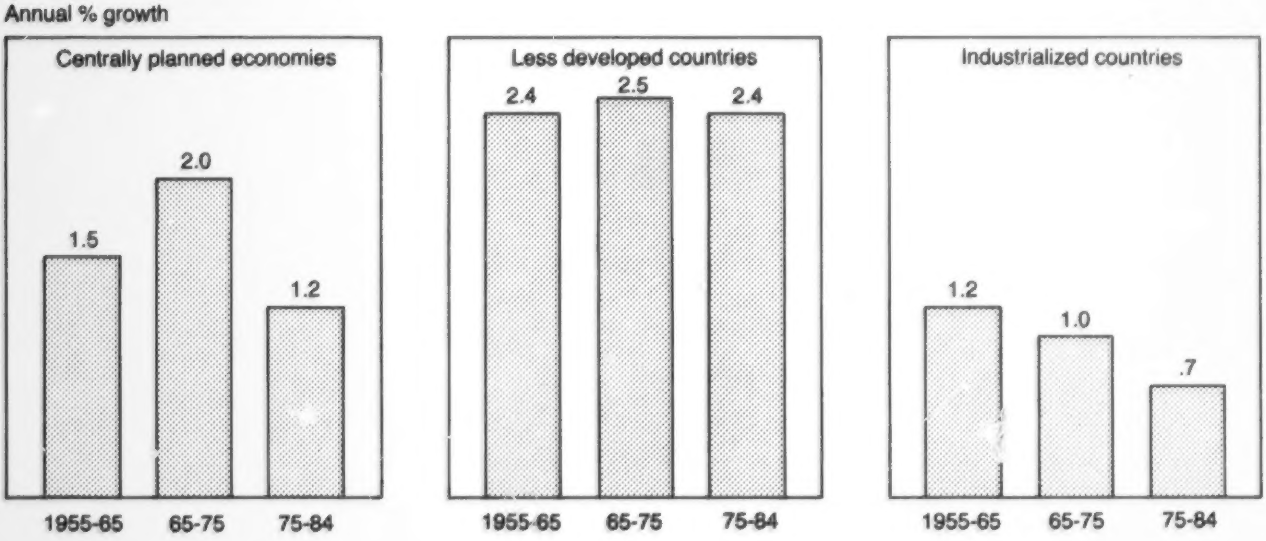
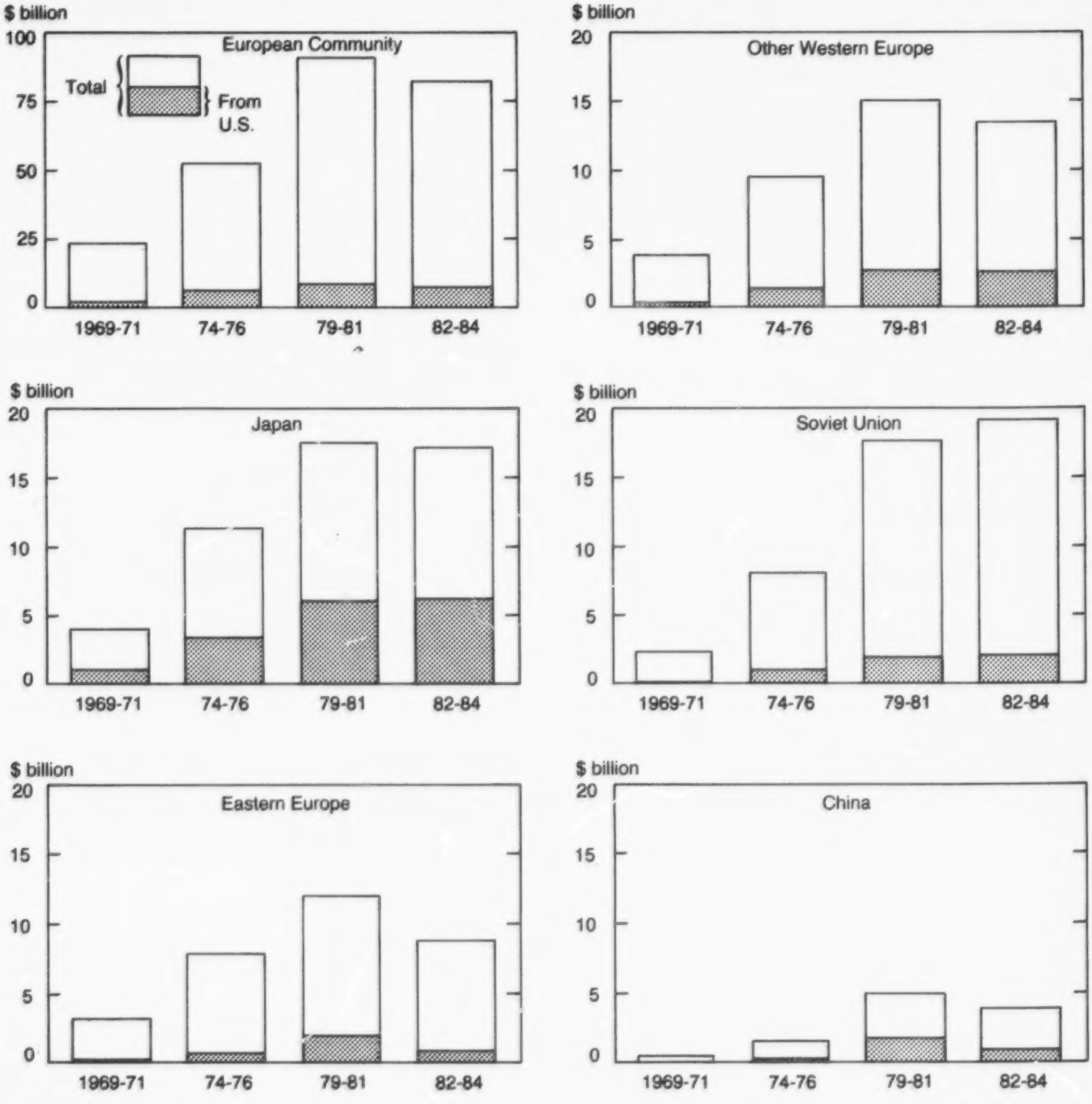


Chart 188

U.S. Market Share of Agricultural Trade by Region, Developed and Centrally Planned Countries

Japan, the largest market for U.S. agricultural products, continues to increase its share. The United States had a 16-percent share of the East European market before debt problems severely restricted imports. The U.S. share of the Chinese market went from 0 in 1970 to 35 percent in 1980 with large purchases of wheat, corn, and cotton.

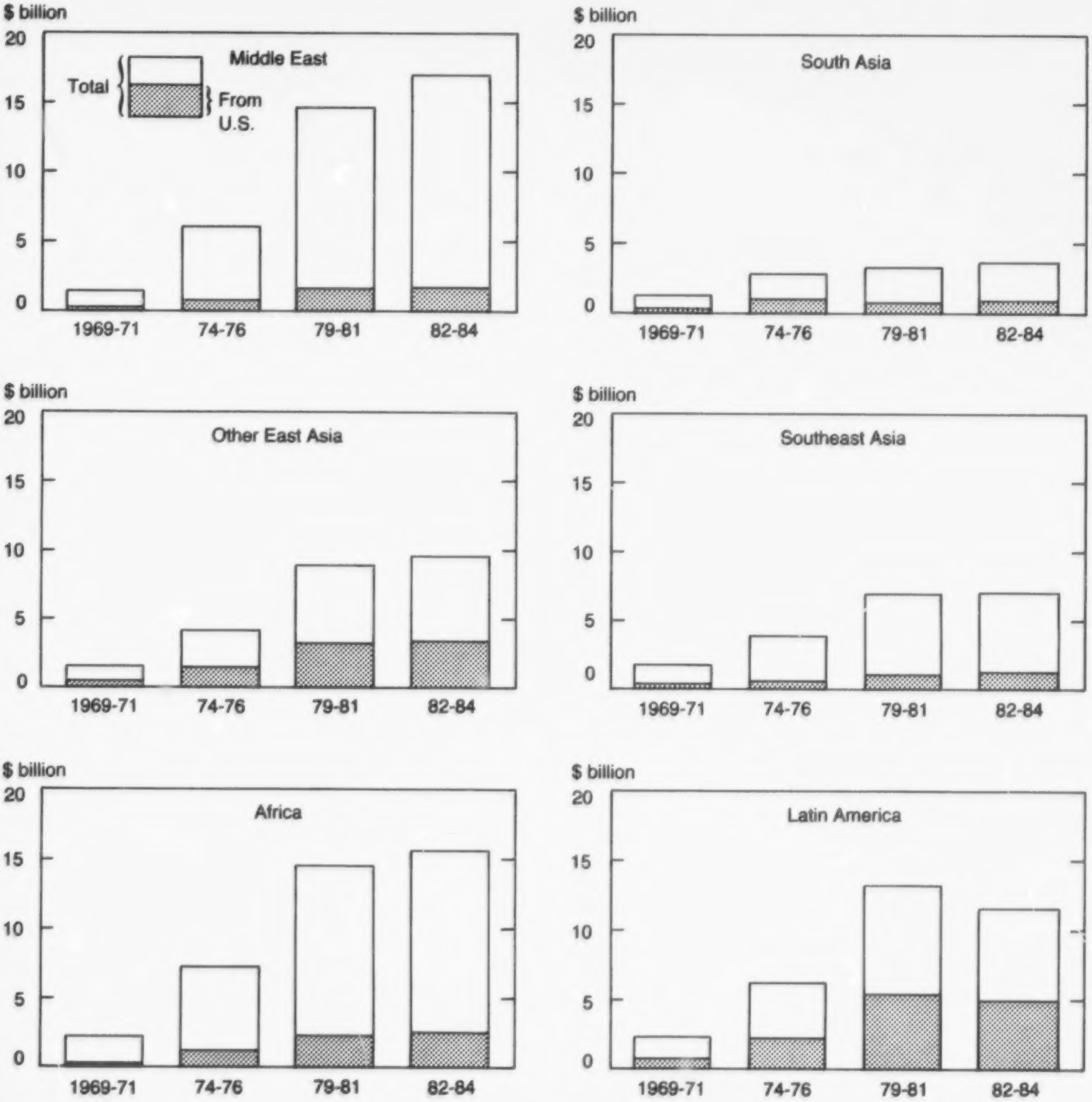


Source: United Nations trade data.

Chart 169

U.S. Market Share of Agricultural Trade by Region, Developing Countries

The U.S. share of the Latin American market has increased nearly 50 percent since 1970. The U.S. market in the Middle East fell as oil revenues soared in the late 1970's.

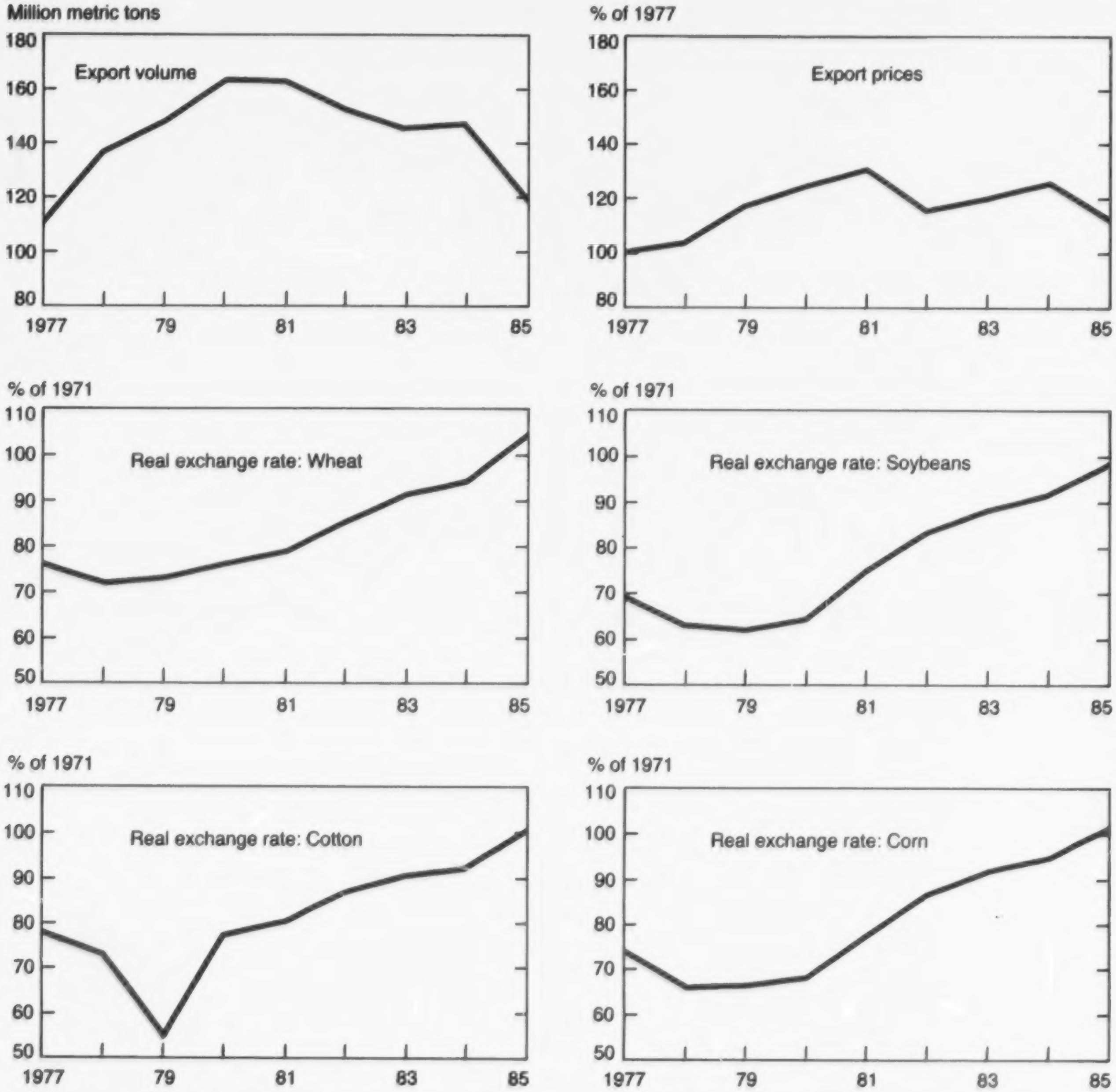


Other East Asia includes South Korea, Taiwan, and Hong Kong. Source: United Nations trade data.

Chart 190

U.S. Agricultural Trade Indicators

U.S. export volume hit its lowest level in 8 years in 1985 at 118.7 million metric tons. Trade-weighted exchange rates of the four major commodities reached record-high levels. Since the late 1970's, the dollar has appreciated in real terms by 45 percent for wheat, 52 percent for corn, 58 percent for soybeans, and 83 percent for cotton.

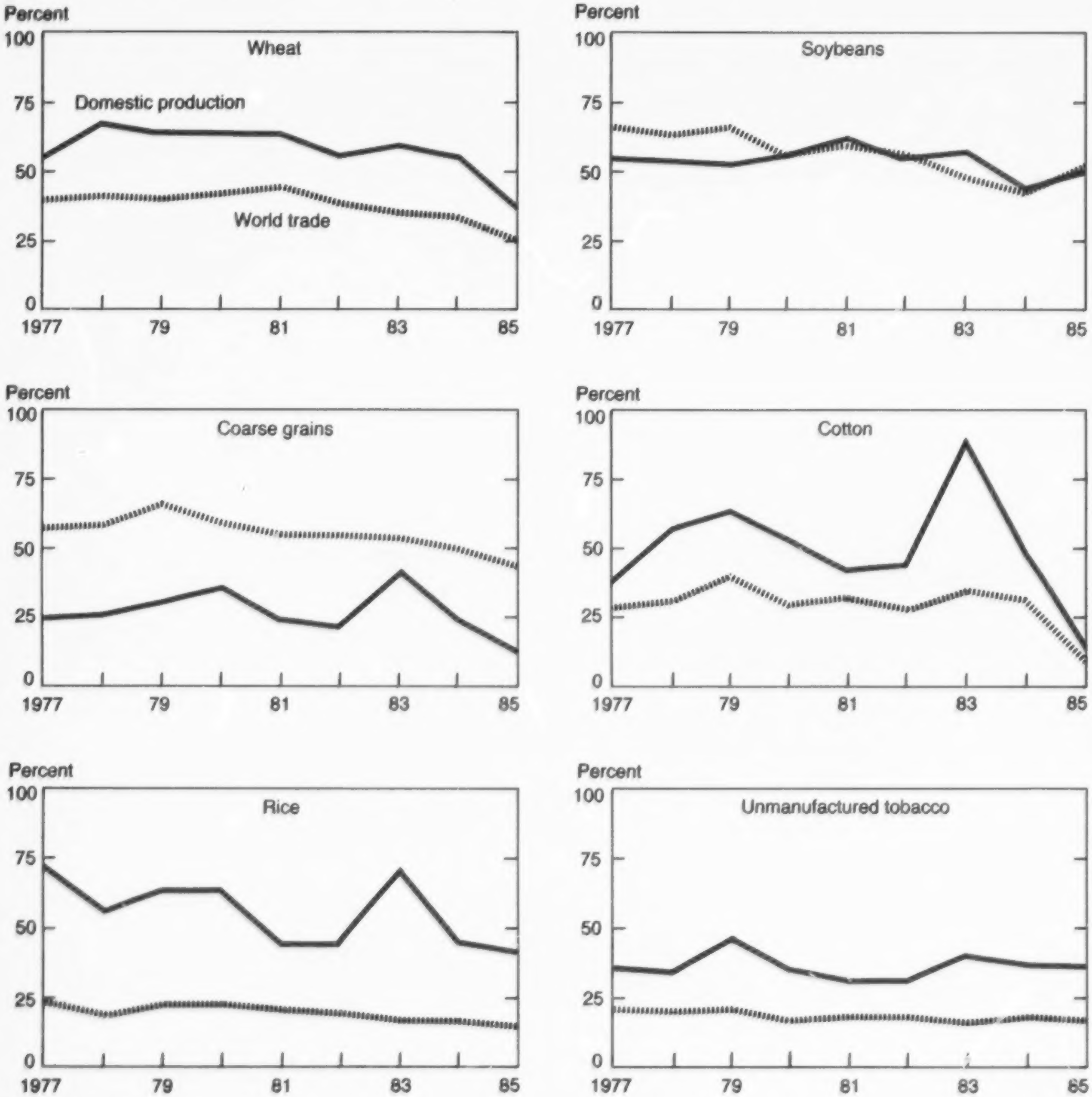


Foreign currency value of the U.S. dollar, weighted by relative size of agricultural trade with the United States, adjusted for inflation by use of a Consumer Price Index for the countries involved. An increasing value indicates that the dollar appreciated against the basket of currencies represented in that commodity market.

Chart 191

U.S. Exports: Share of Domestic Production and World Trade

U.S. export share of domestic production and world trade fell for every major commodity except soybeans in 1985, with wheat, coarse grains, and cotton exports falling to unheard of levels—37, 13, and 15 percent, respectively, as shares of domestic production.



Crop years used for share of domestic production.

Chart 192

U.S. Agricultural Exports and GNP Growth, Developed Regions

Real GNP growth, another variable influencing agricultural exports, can be offset by such factors as price movements and weather. In industrialized markets such as Japan, Western Europe, and Canada, GNP growth affects farm imports indirectly through increased per capita income.

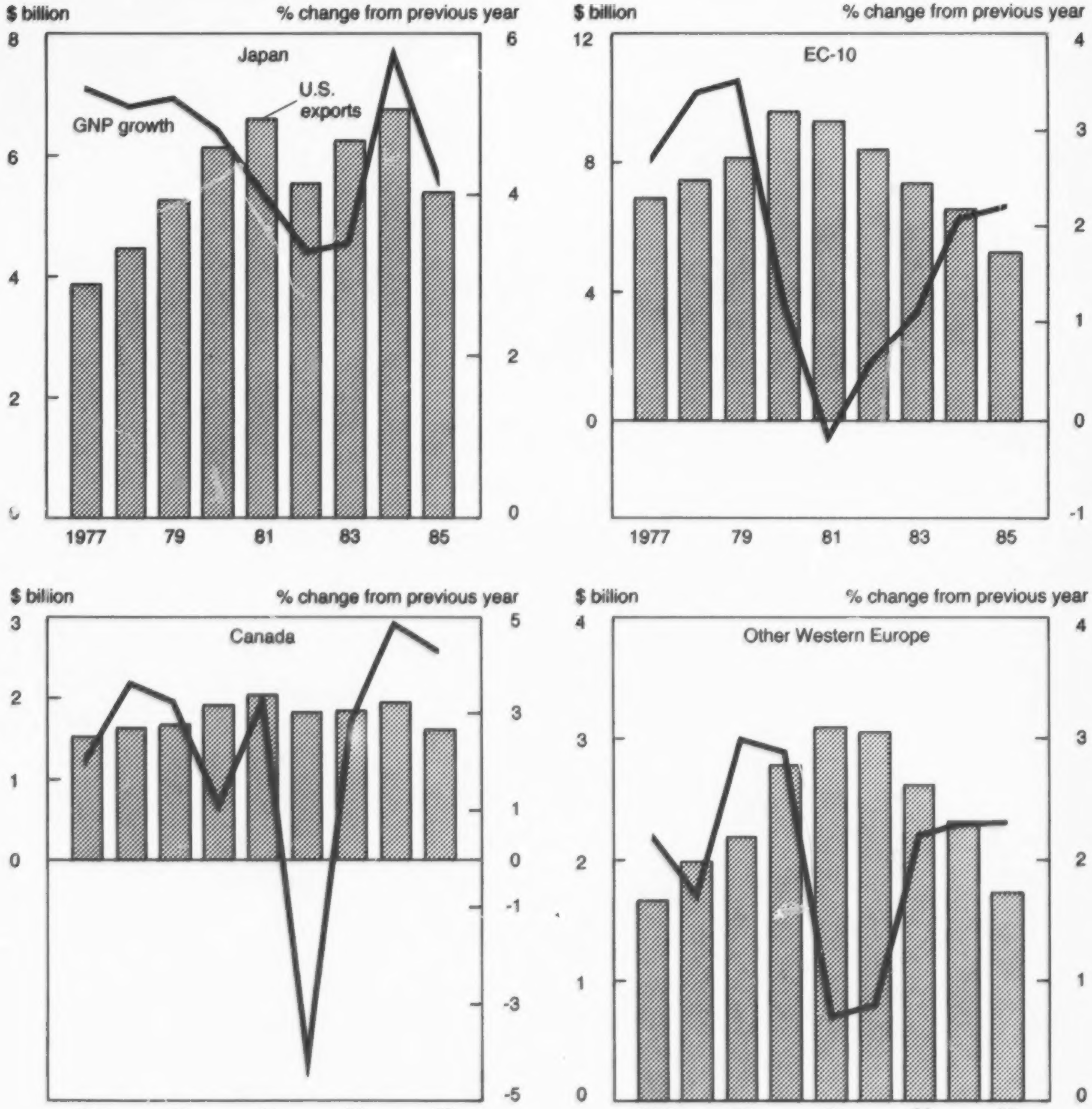


Chart 193

U.S. Agricultural Exports and GNP Growth, Centrally Planned and Developing Regions

Rapid GNP growth as exhibited by such East Asian countries as South Korea, Hong Kong, and Taiwan in the late 1970's and early 1980's, produced an income effect much like that in developed countries. Likewise, slow growth and decline in GNP in Latin America corresponds to declining U.S. exports to that region.

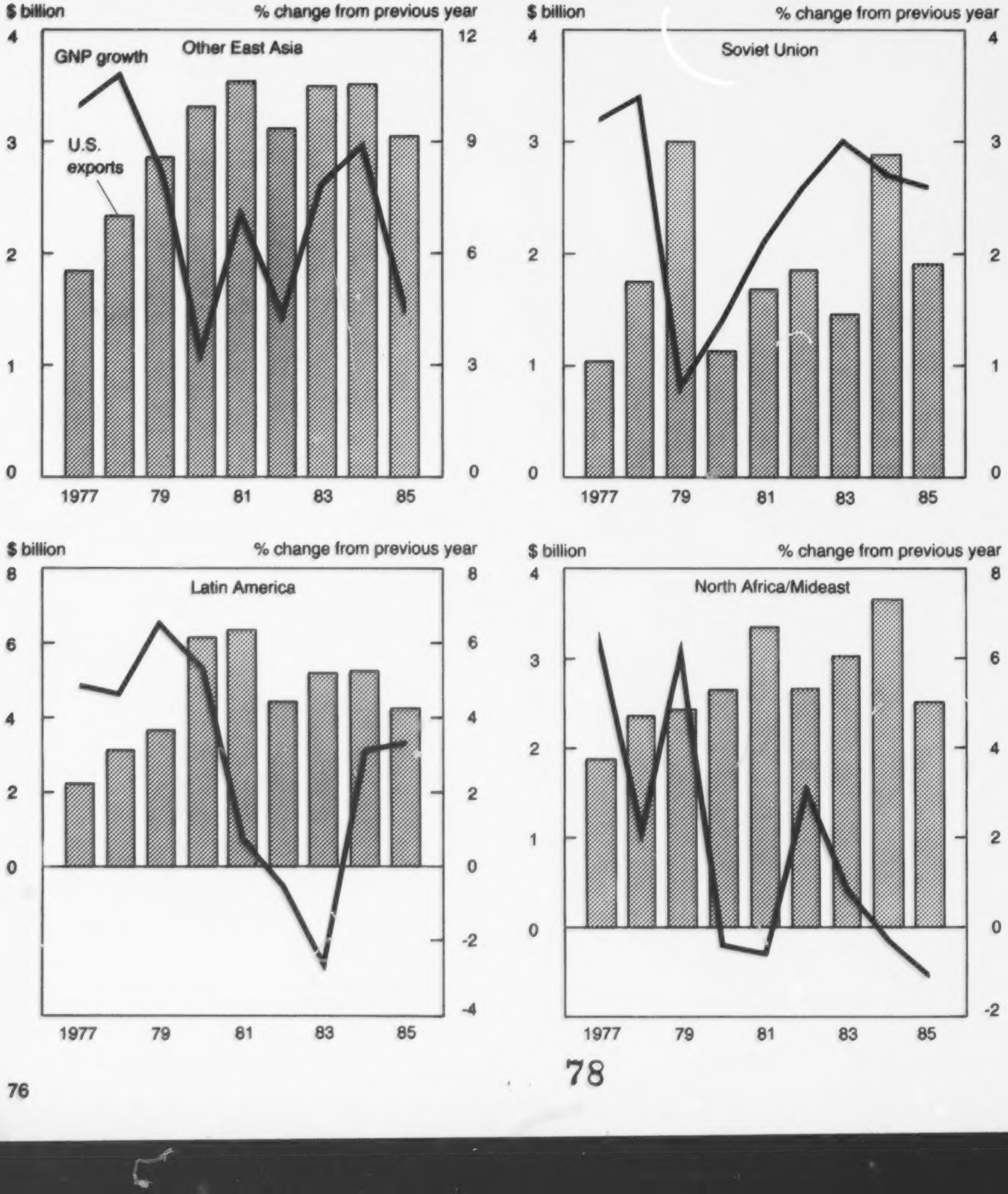


Chart 194

U.S. Farm Machinery Trade

Since its 1981 peak at $1.4 billion, the farm machinery trade balance has dwindled. The balance has declined about 79 percent since 1981 to $298 million in 1985.

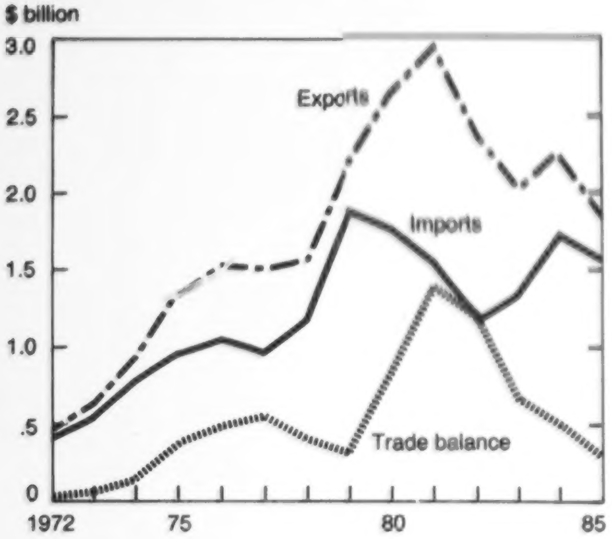


Chart 195

U.S. Agricultural Exports and Farm Prices

Prices received by farmers fell 9 percent in 1985 from their 1984 peak to their lowest level in 7 years, partly because of the 23-percent drop in exports.

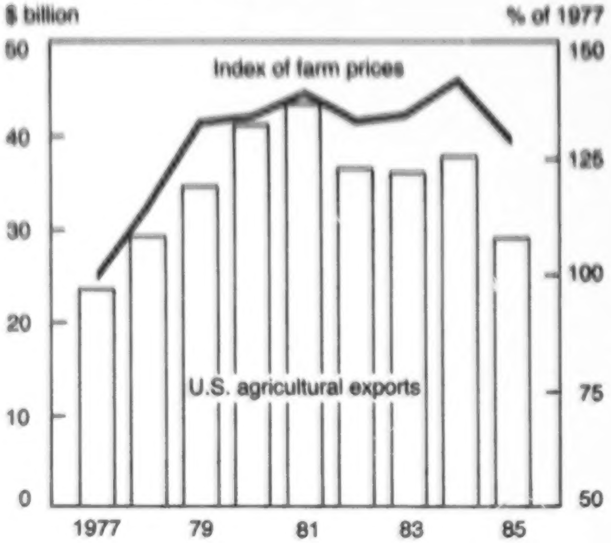


Chart 196

Value of U.S. Agricultural Exports by Commodity

Value of U.S. agricultural exports fell to $29 billion in 1985, 23 percent below 1984 and the lowest level in 8 years, primarily as a result of declining grain and oilseed exports.

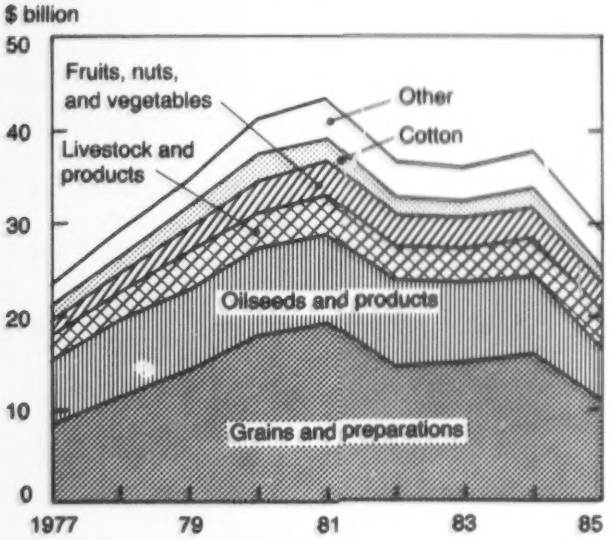


Chart 197

Volume of U.S. Agricultural Exports by Commodity

Export volume fell 19 percent in 1985 to 118.7 million metric tons. This is the lowest export tonnage level in 8 years, a 27-percent drop from the peak of 162.9 million tons in 1980.

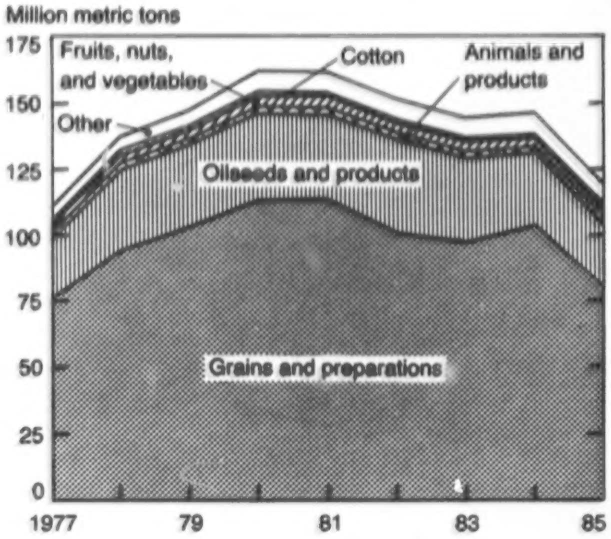


Chart 196

Export Prices for Major U.S. Crops

Since the 1981 peak in export prices for all commodities, wheat and corn prices have fallen 19 percent, soybeans 22 percent, and rice 31 percent. Increased foreign competition, bumper U.S. harvests, reduced overall demand, and appreciation of the dollar led to the general decline in export prices for all major commodities.

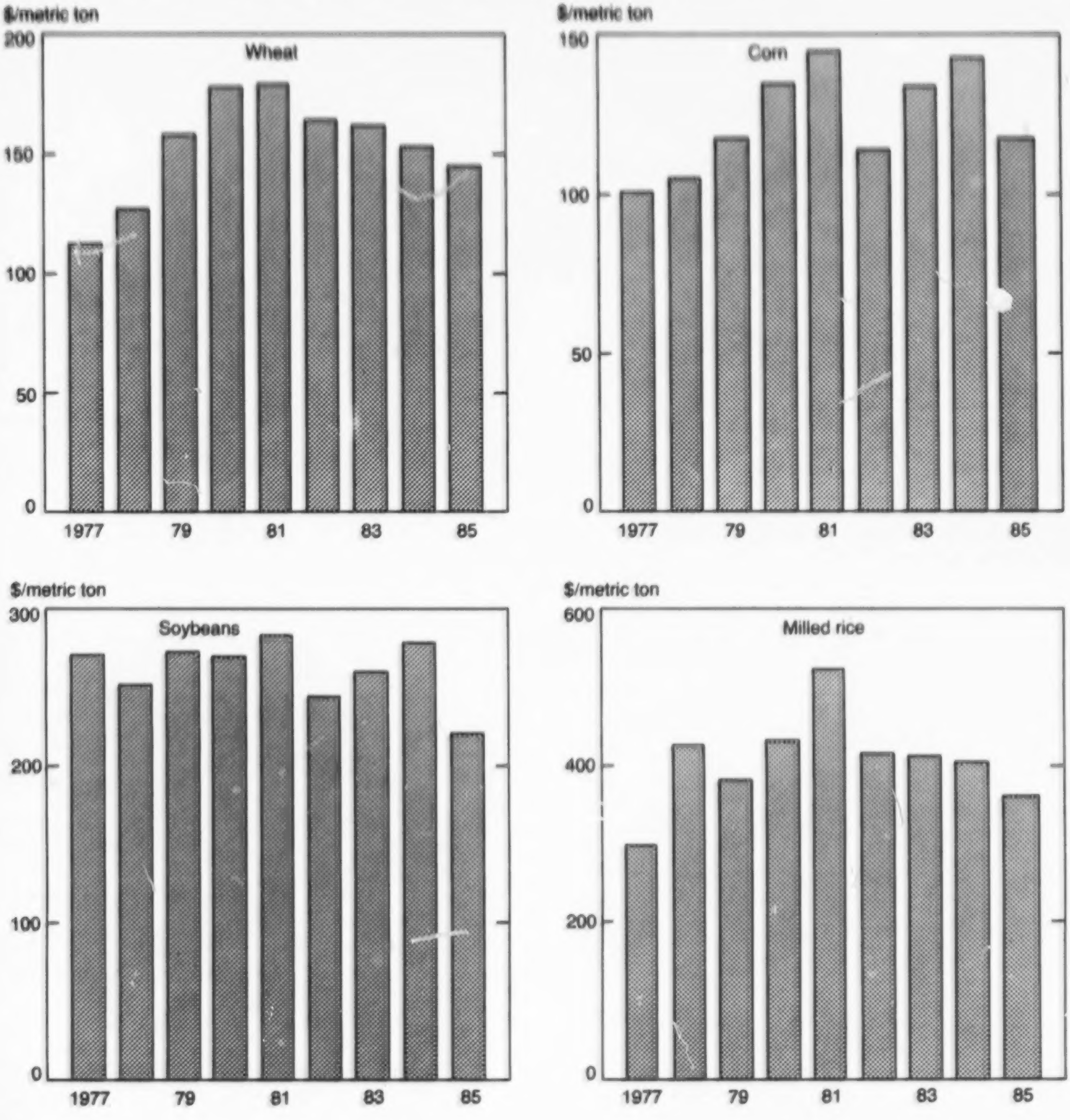
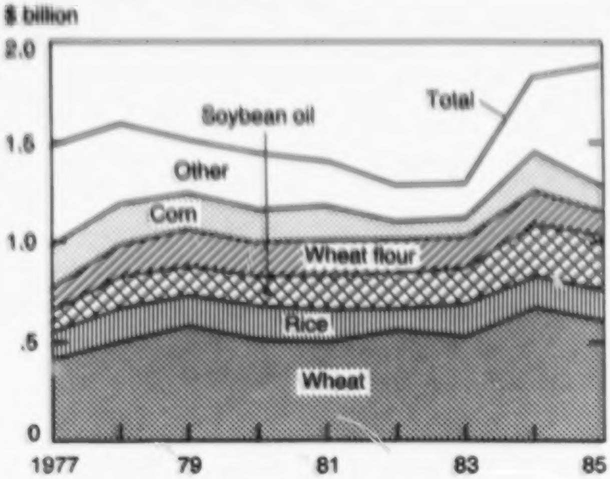


Chart 199

Concessional Export Sales of U.S. Agricultural Products

U.S. concessional sales reached $1.9 billion in 1985, for a total of nearly 6 million tons. The largest markets were Egypt, the Sudan, and Ethiopia.



Other includes corn-soya-milk blend, bulgur wheat, nonfat dry milk, cornmeal, oilcake and meal, cotton, and tobacco.

Chart 200

U.S. Agricultural Exports to Asia

U.S. farm exports to Asia fell 25 percent in 1985, with Japan, China, South Korea, Taiwan, Indonesia, and Iraq accounting for 73 percent, or $2.7 billion, of that decline.

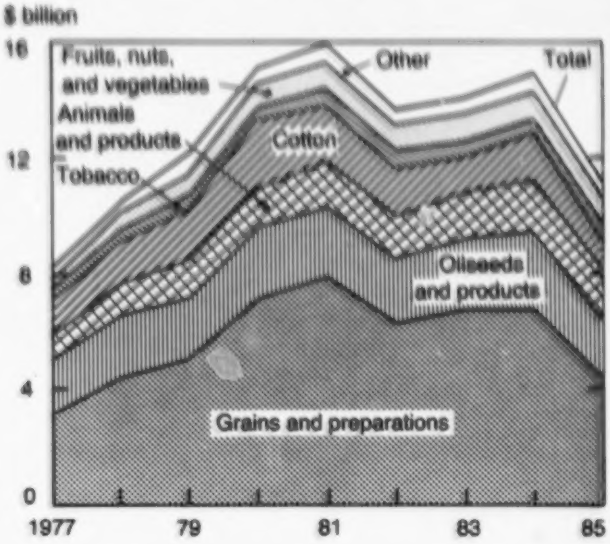


Chart 201

U.S. Agricultural Exports to Africa

Exports to Africa fell 16 percent to $2.5 billion in 1985 despite $1.05 billion in food aid, mostly to East Africa. Largest African markets: Egypt, Nigeria, Algeria, Sudan, and Ethiopia.

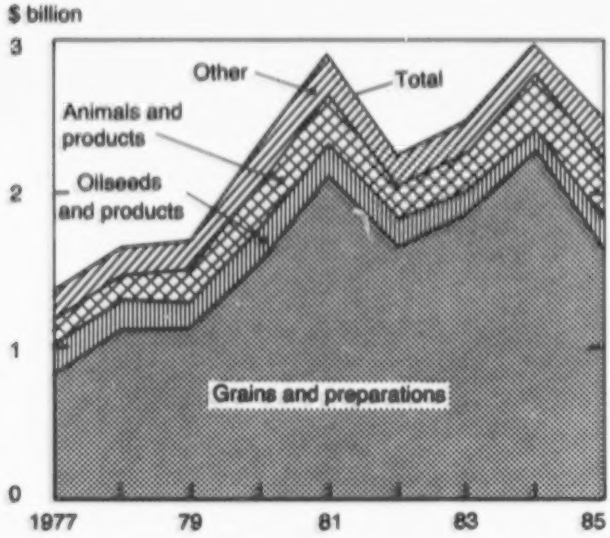


Chart 202

U.S. Agricultural Exports to Latin America

U.S. farm exports to Latin America fell 20 percent in 1985, with 9 percent of the exports in food aid. Top markets were Mexico, Venezuela, Brazil, Colombia, and Jamaica.

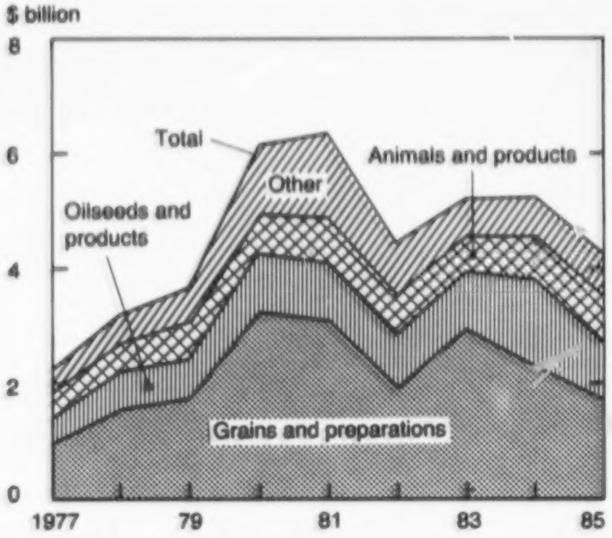
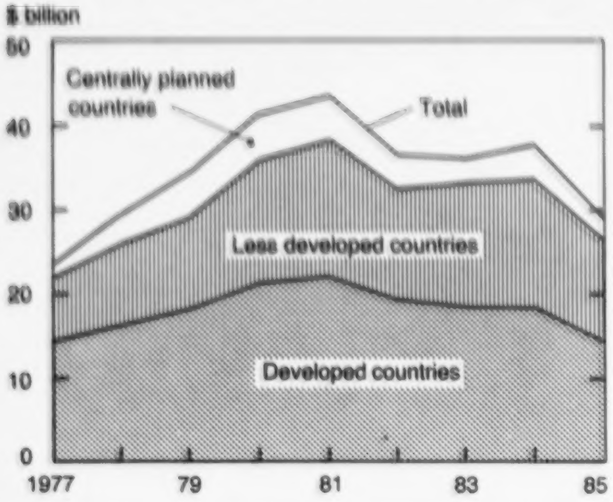


Chart 203

U.S. Agricultural Exports to Major Areas

Centralized purchasing decisions such as those by the Soviet Union create a different trade pattern than profit-oriented decisions in Japan or starvation prevention in the Sudan.



Adjusted for transshipments through Canada.

Chart 204

U.S. Agricultural Exports to Centrally Planned Countries

U.S. agricultural exports to centrally planned countries fell 40 percent in 1985 to $2.5 billion. Nearly all this decline was in wheat trade with the Soviet Union and China.

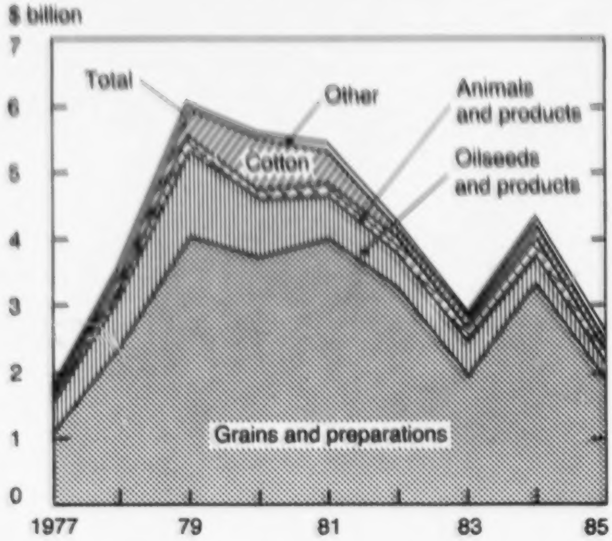


Chart 205

U.S. Agricultural Exports to Less Developed Countries

The largest importers among developing countries were Mexico, South Korea, Taiwan, Egypt, and Venezuela. U.S. sales to less developed countries fell 20 percent in 1985.

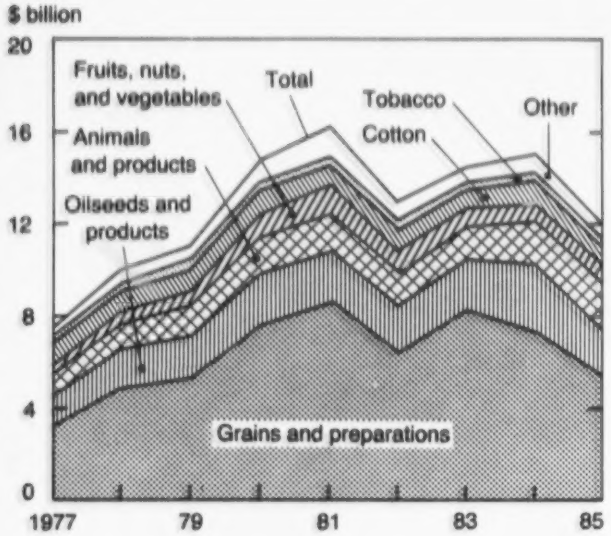


Chart 206

U.S. Agricultural Exports to Developed Countries

Developed countries took $14.5 billion of U.S. farm exports in 1985. Grains and oilseeds are the most important commodity and have shown the most drastic decline.

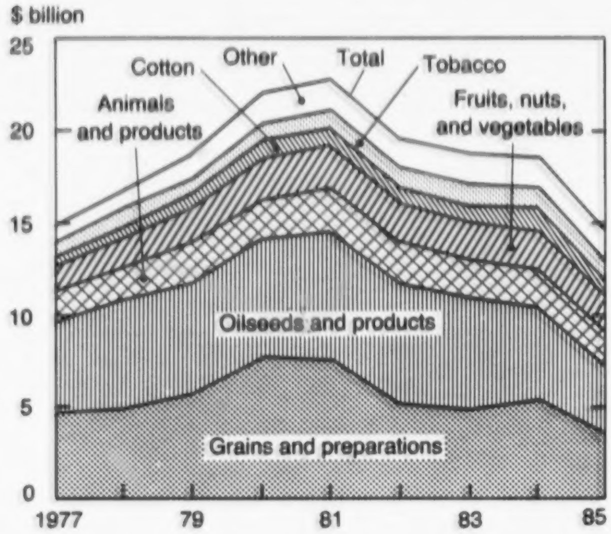
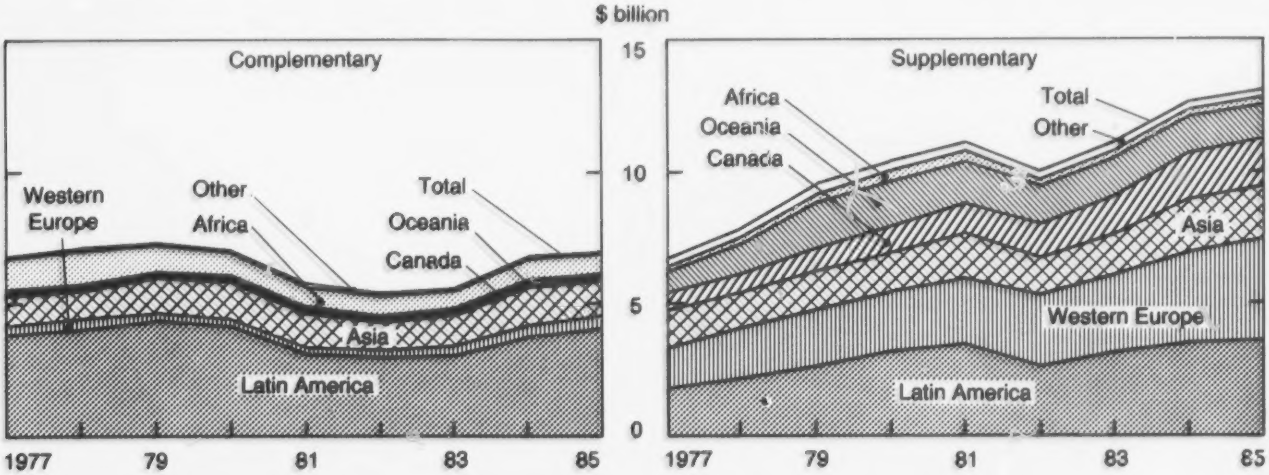


Chart 207

Origin of U.S. Agricultural Imports

Ninety percent of all complementary imports come from Asia, Africa, or Latin America, largely due to climatic differences. Western Europe has emerged as the largest supplier of supplementary imports, mostly wine and beer sales.

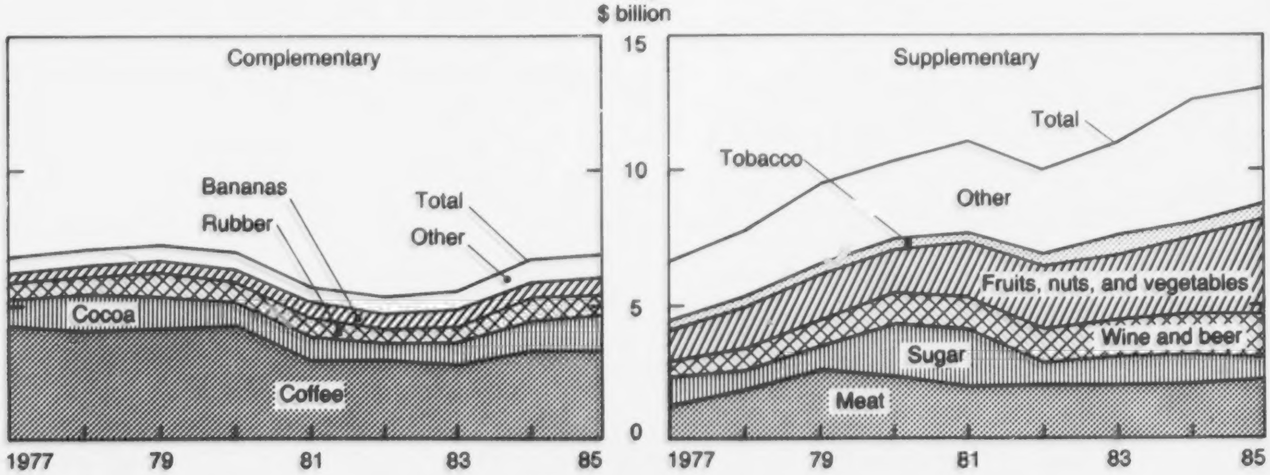


Complementary imports are those which do not compete with U.S. agricultural products, such as coffee, cocoa, and bananas. Supplementary imports compete with domestically produced products such as meat and sugar.

Chart 208

U.S. Agricultural Imports by Commodity

Despite health concerns, freezes, and substitutes, coffee remains the largest U.S. agricultural import by value. Complementary imports have increased marginally since 1977 while supplementary imports have doubled.

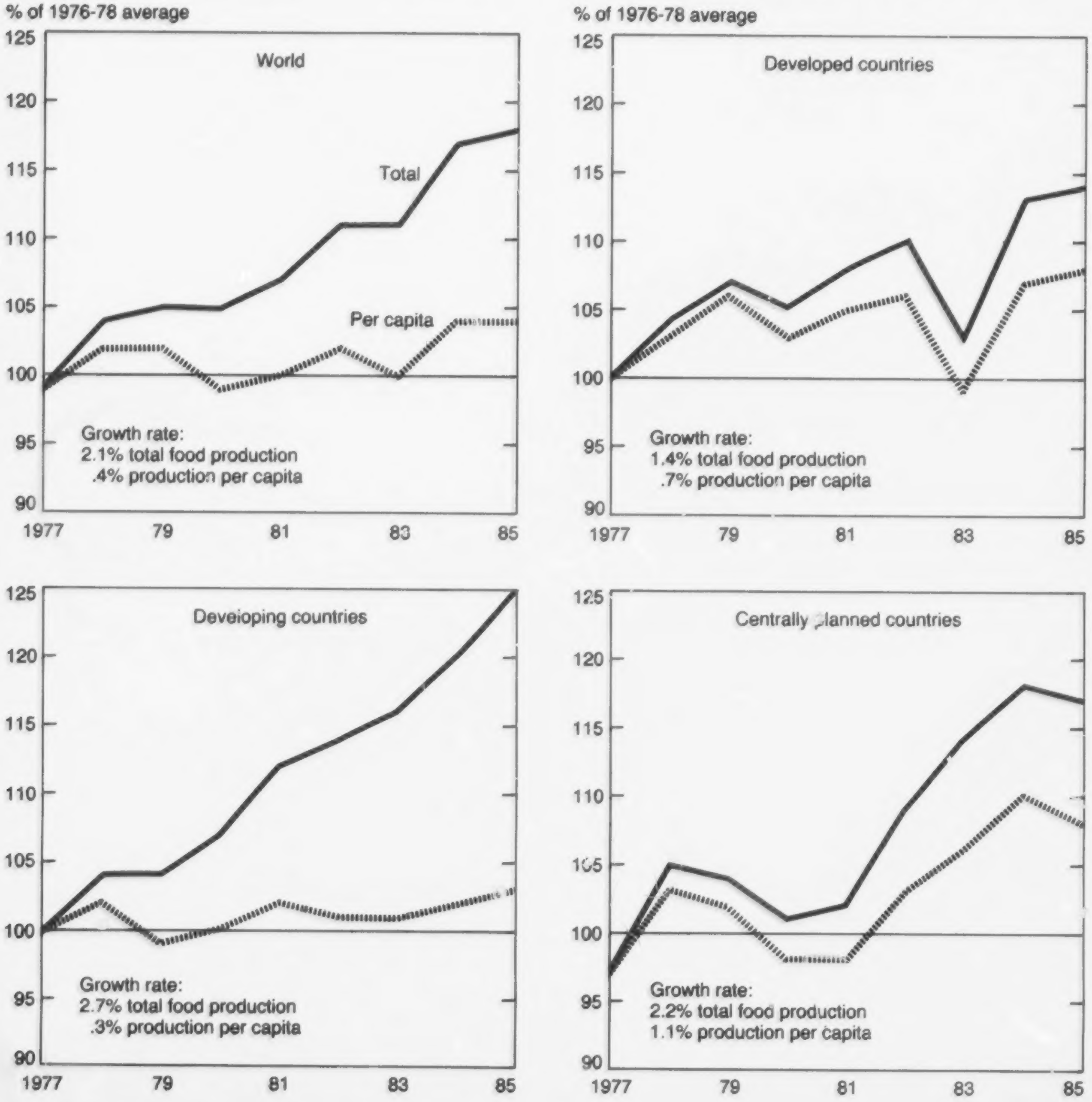


Complementary imports are those which do not compete with U.S. agricultural products, such as coffee, cocoa, and bananas. Supplementary imports compete with domestically produced products such as meat and sugar.

Chart 209

Changes in World Food Production

The index of world food production was slightly higher in 1985 at 118 (1976-78 average = 100). China maintained its production at the 1984 level. If China were excluded, world per capita production over the past 10 years would have declined 0.2 percent annually.

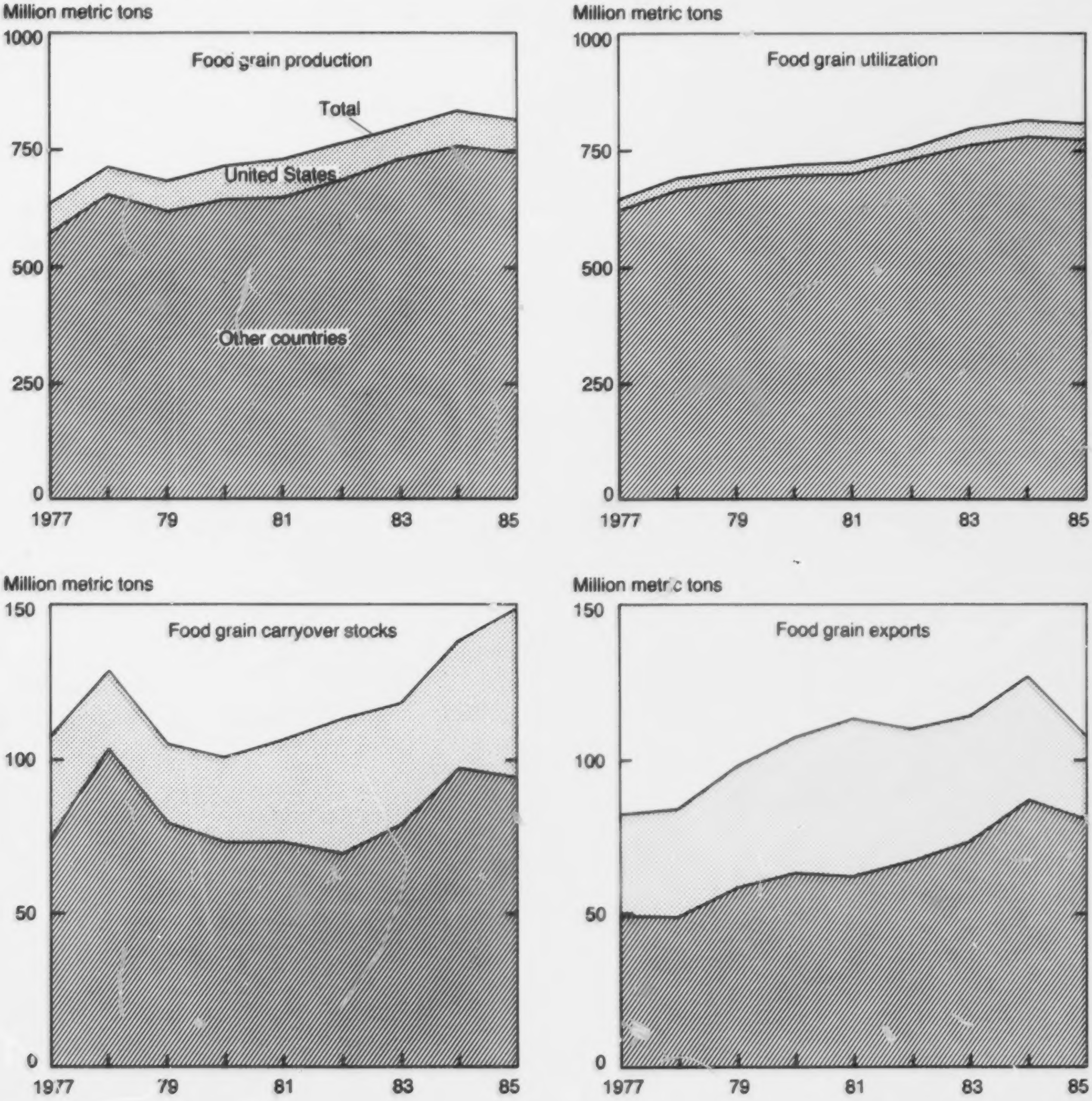


Compound annual growth rates computed by least squares method, 1975-84.

Chart 210

World and U.S. Food Grain Production, Utilization, Carryover, and Exports

Global production of wheat and milled rice fell 2 percent below the record 1984 crop to 818 million metric tons. Utilization fell 1 percent to 808 million tons. U.S. stocks rose to a record 54 million tons, while stocks in the rest of the world remained near 95 million tons.



Food grains include wheat and milled rice.

Chart 211

World and U.S. Feedgrain Production, Utilization, Carryover, and Exports

Global feedgrain production (corn, sorghum, barley, oats, millet) was a record-high 842 million tons in 1985. The United States accounted for one-third of that total. Despite bumper crops in exporting countries, world feedgrain trade fell 9 percent to 92 million tons.

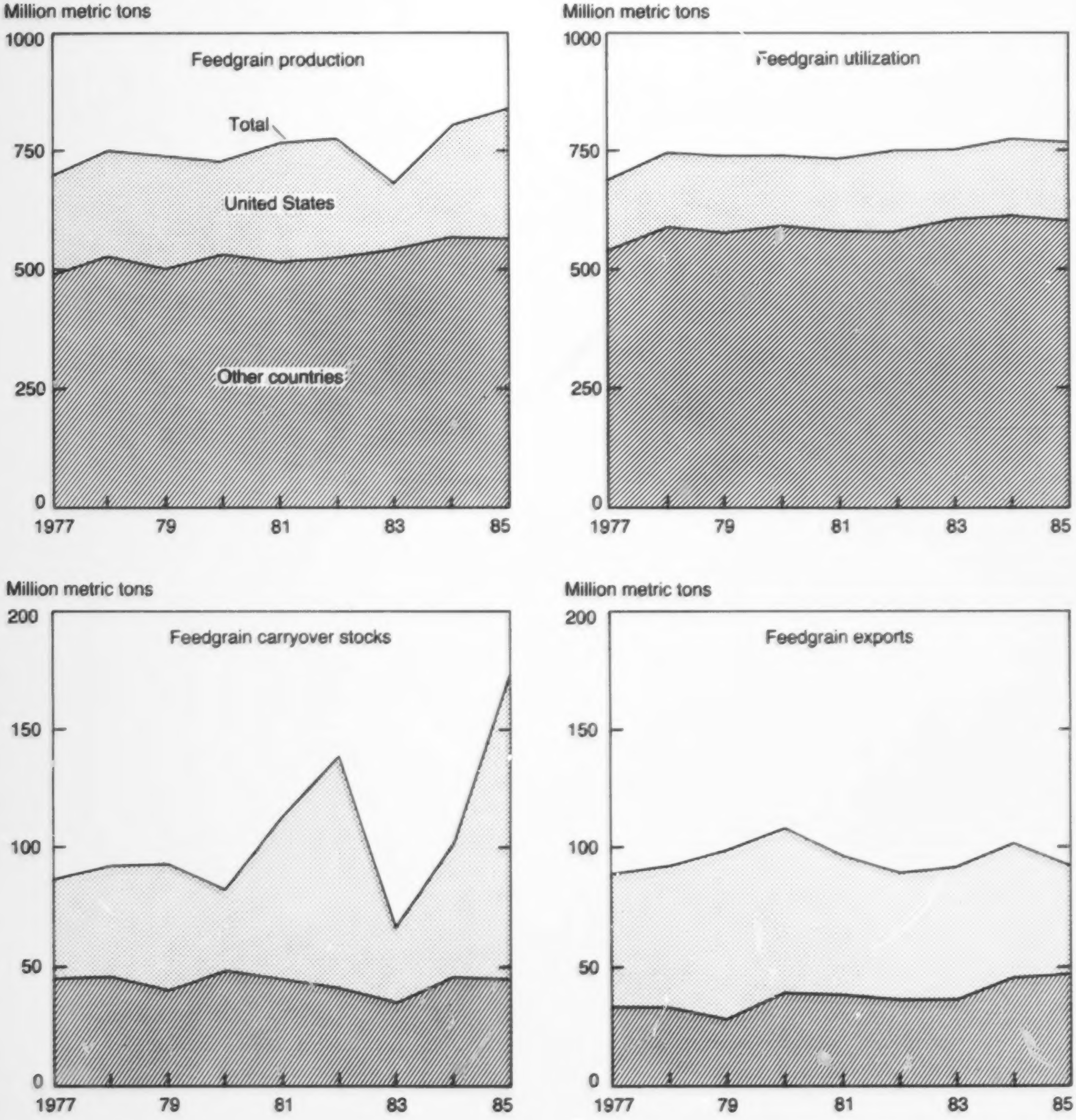
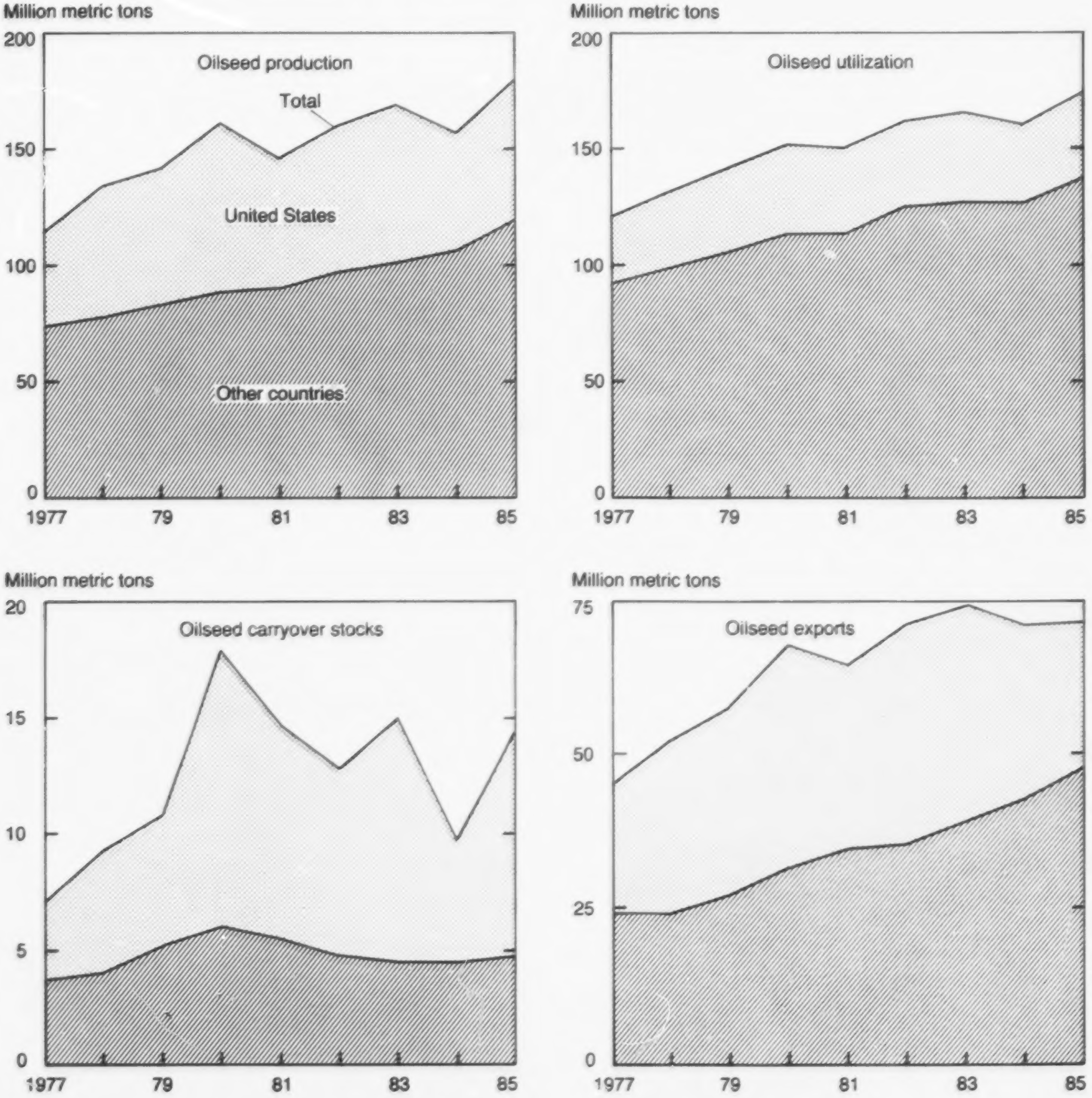


Chart 212

World and U.S. Oilseed Production, Utilization, Carryover, and Exports

Global oilseed production reached a record 179 million tons in 1985. Although ending stocks were small due to the perishability of oilseeds, the United States made the largest share of stockholding adjustments necessary at the given price.



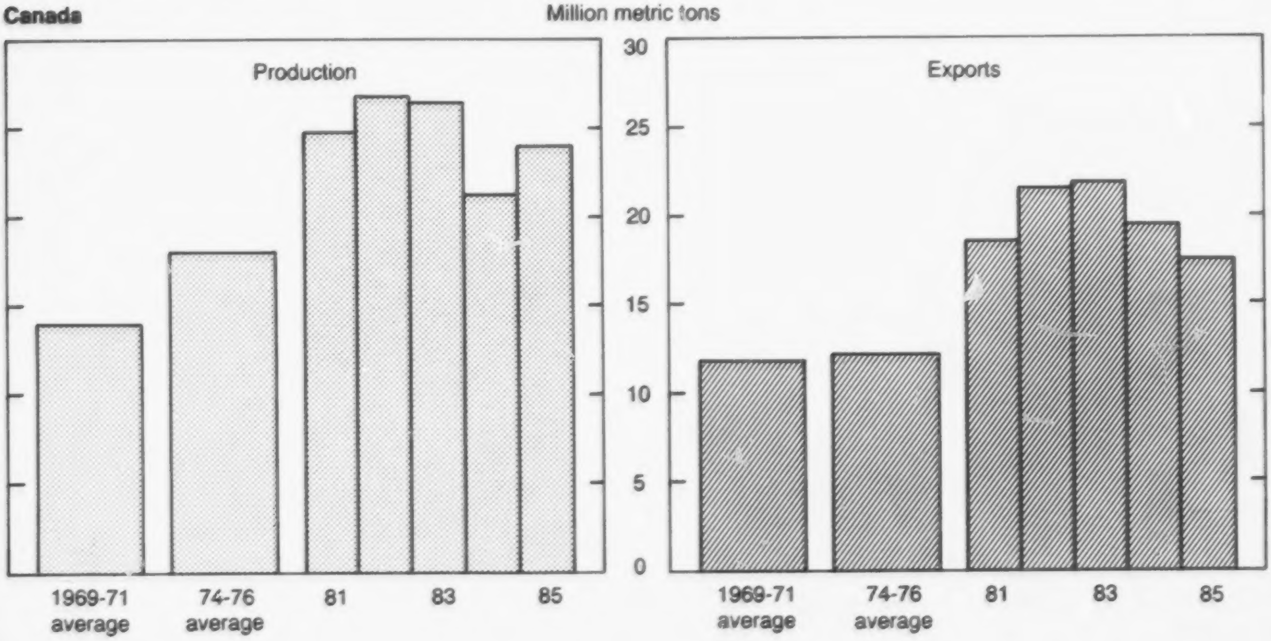
Oilseeds include soybeans, cottonseed, sunflowers, peanuts, and rapeseed.

Chart 213

Wheat Export Competitors: Canada and Australia

Canada and Australia have exported over 75 percent of their wheat output in the past 2 years, with a 20- and 18-percent share of the world wheat market, respectively, in 1985. Both markets are controlled by wheat marketing boards.

Canada



Australia

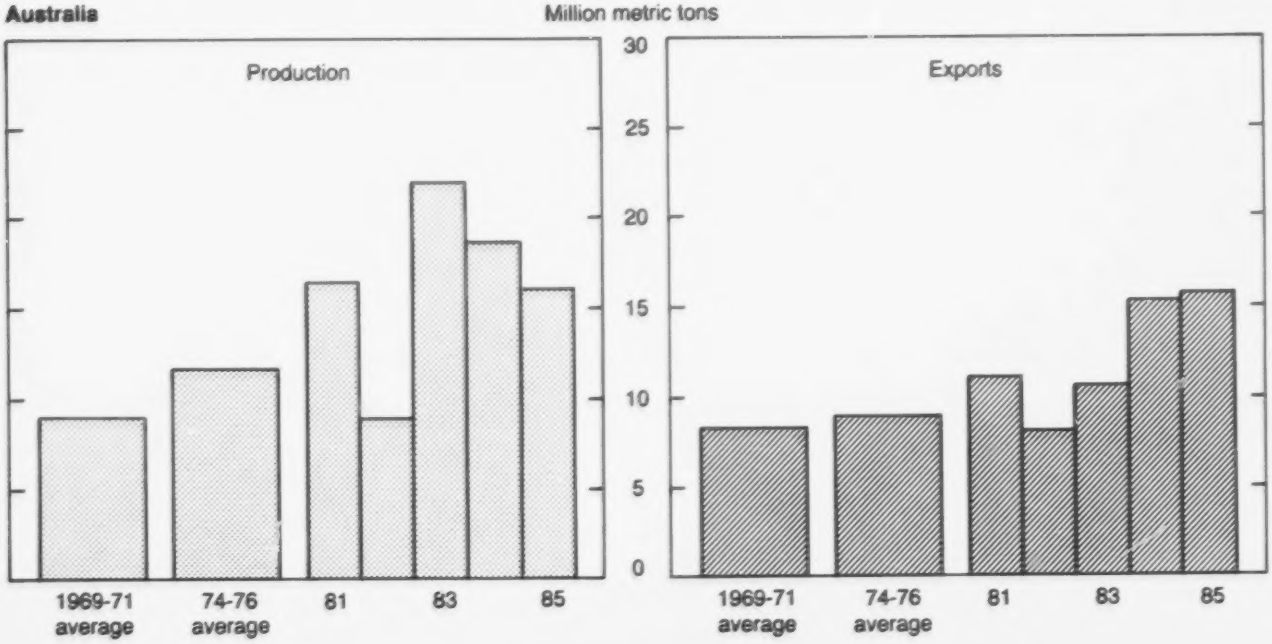
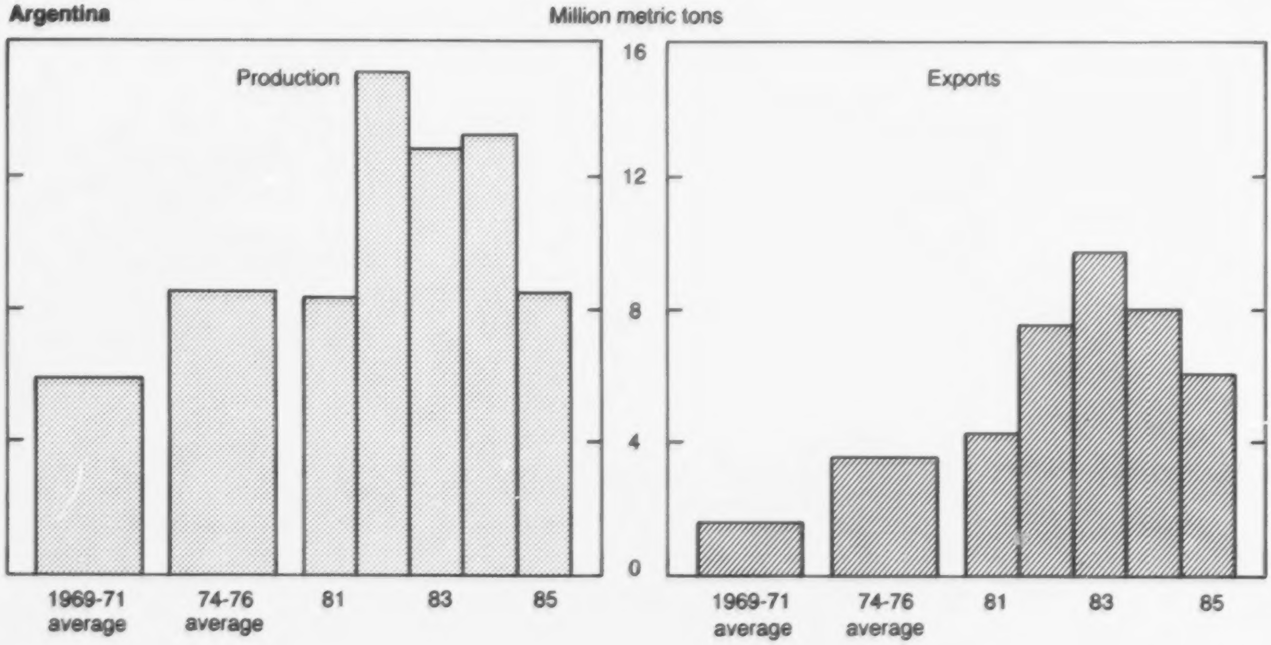


Chart 214

Wheat Export Competitors: Argentina and France

Like the United States, both Argentina and France export about 60 percent of their wheat production. In 1985/86, France had a 20-percent share and Argentina a 7-percent share of the world wheat market.

Argentina



France

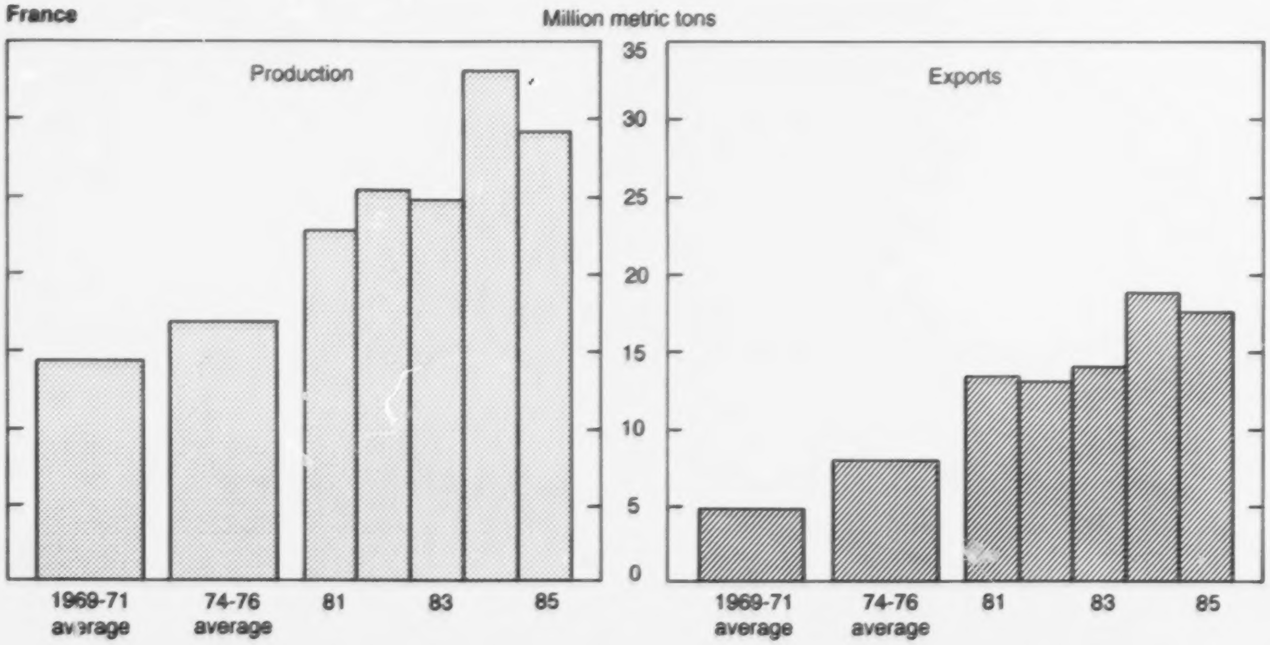
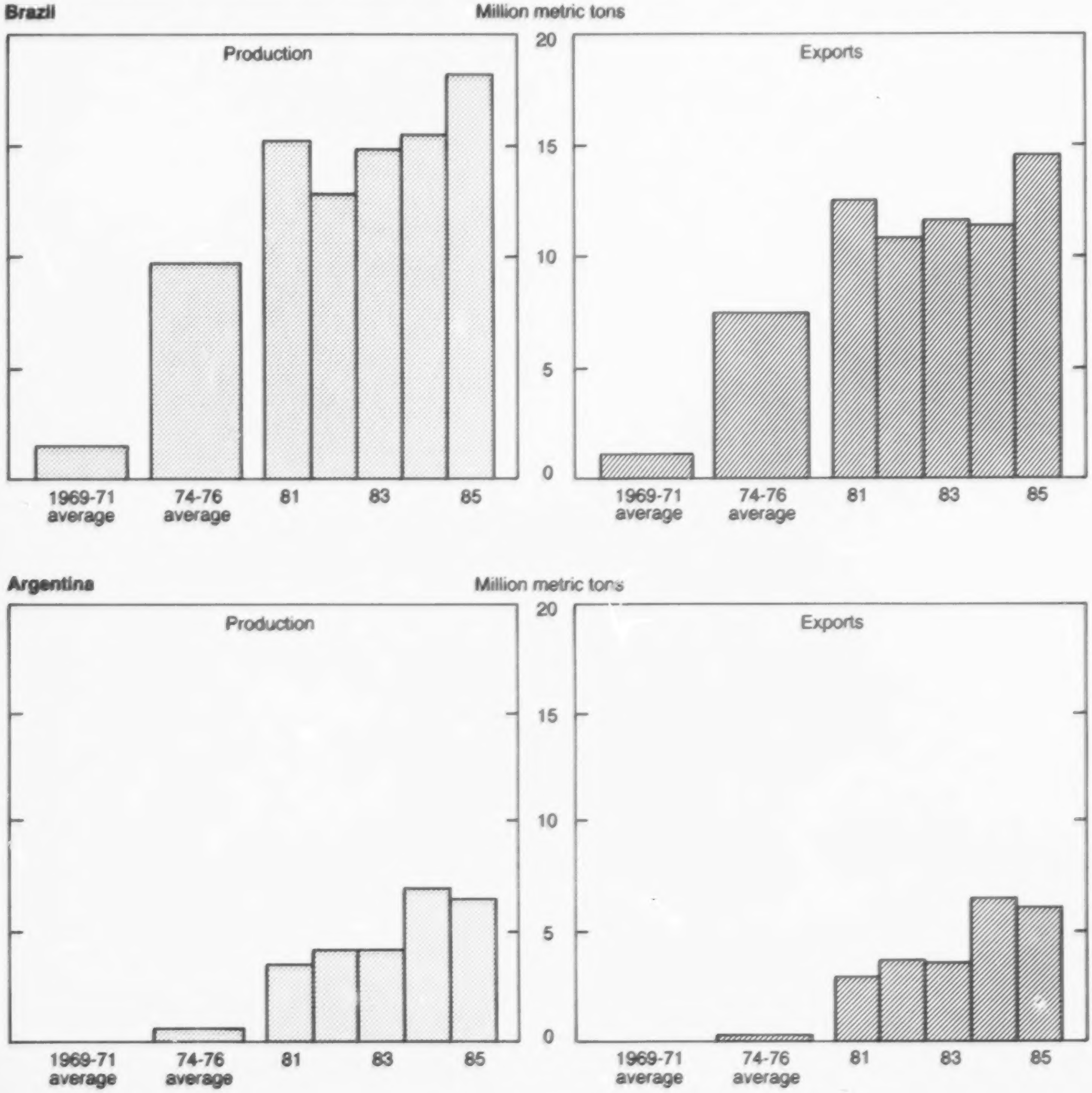


Chart 215

Soybean Export Competitors: Brazil and Argentina

Brazil and Argentina, the principal U.S. competitors in the world soybean market, have made sizeable market gains since 1969-71, when U.S. production was 31 million tons and exports, 15 million tons. Argentina exported an average of 90 percent and Brazil, 80 percent, of their production over the last 5 years.



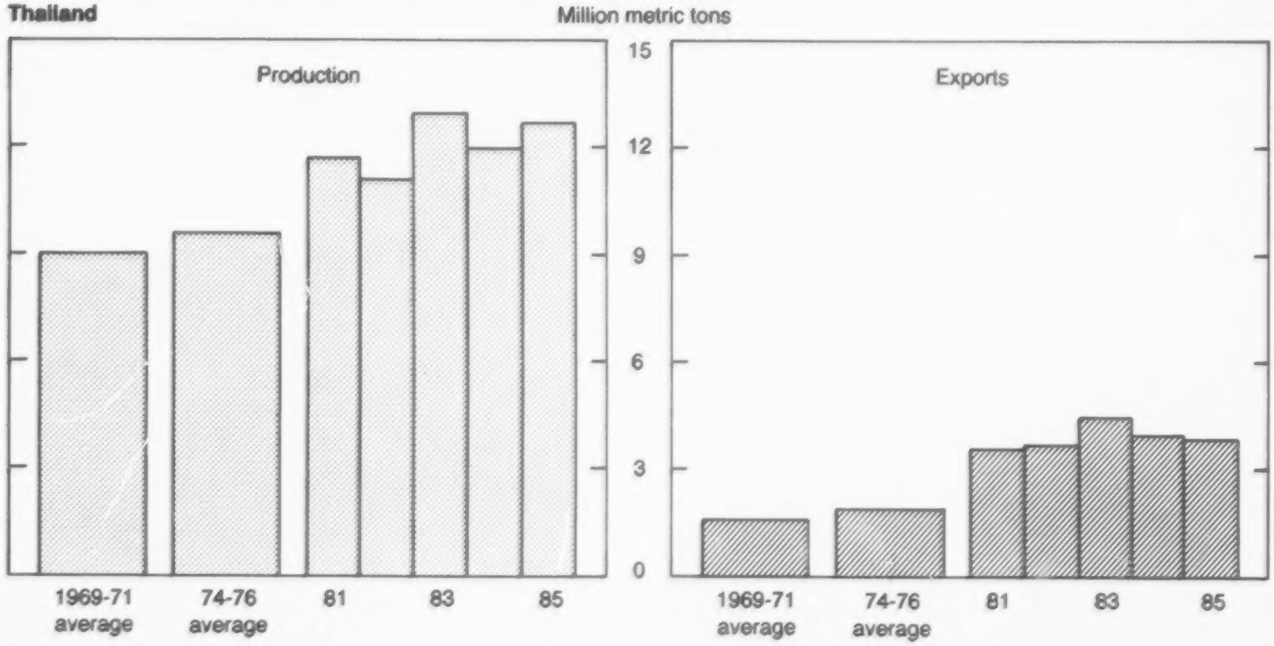
Includes soybean meal in bean equivalent.

Chart 216

Rice Export Competitors: Thailand and Pakistan

Although Thailand exports only one-third of its rice crop, it has replaced the United States as the largest rice exporter. Pakistan has also become a more aggressive rice exporter, shipping about one-third of its crop.

Thailand



Pakistan

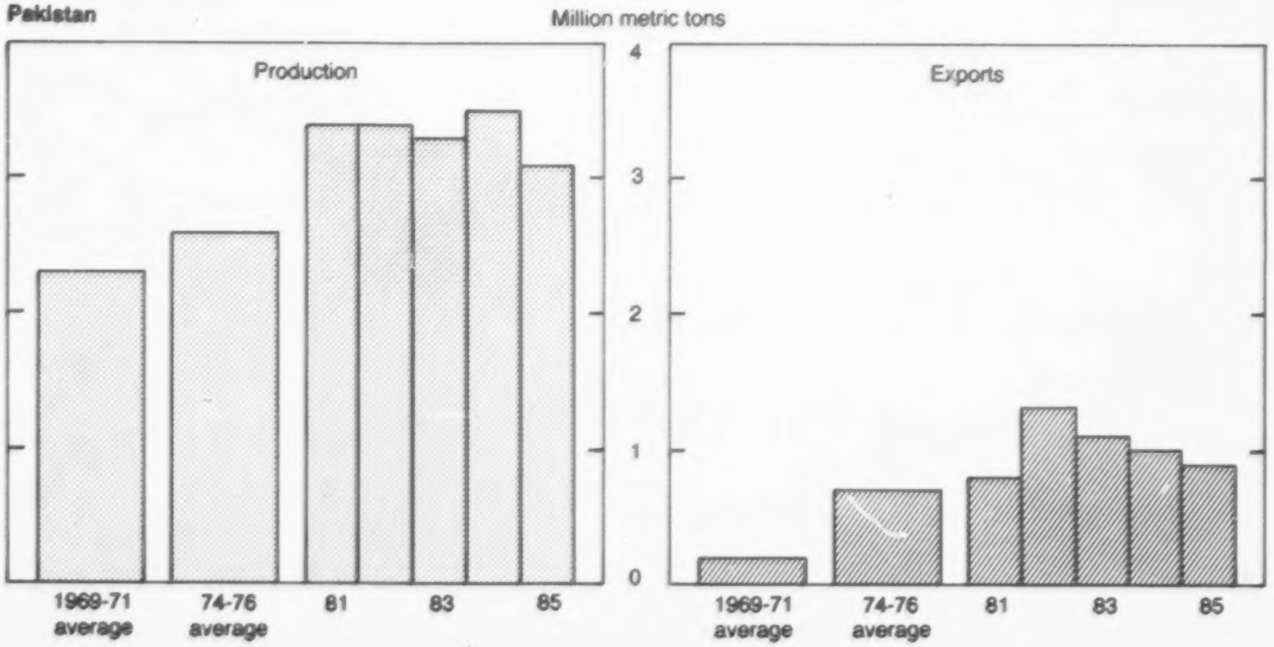
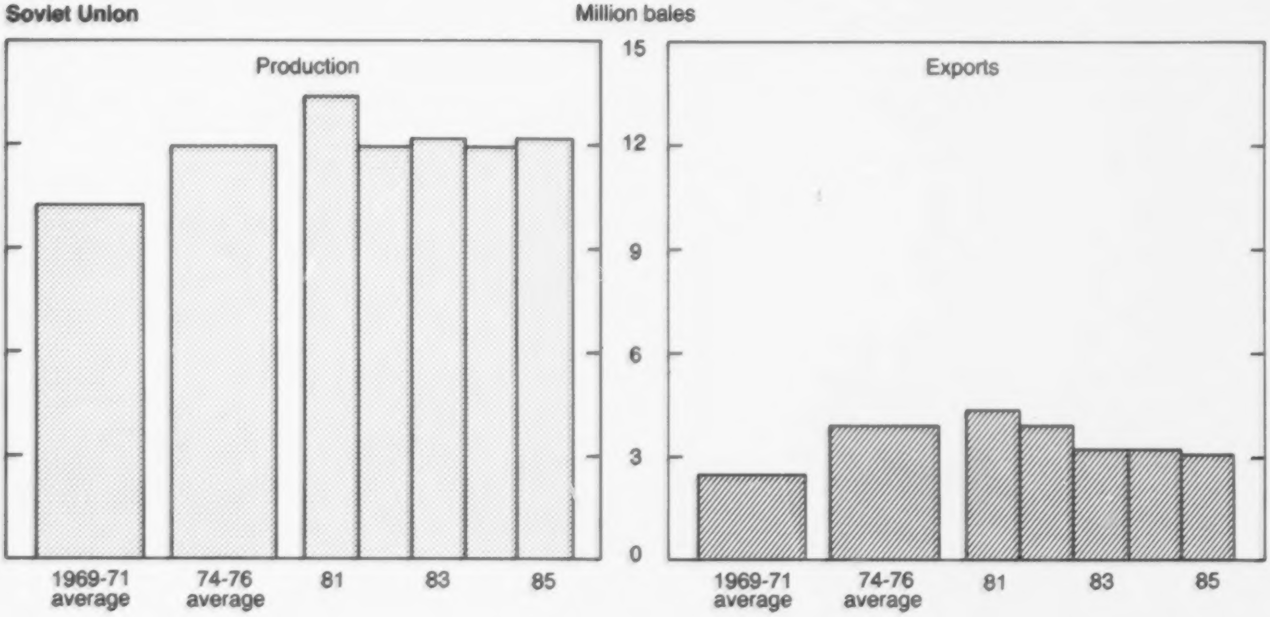


Chart 217

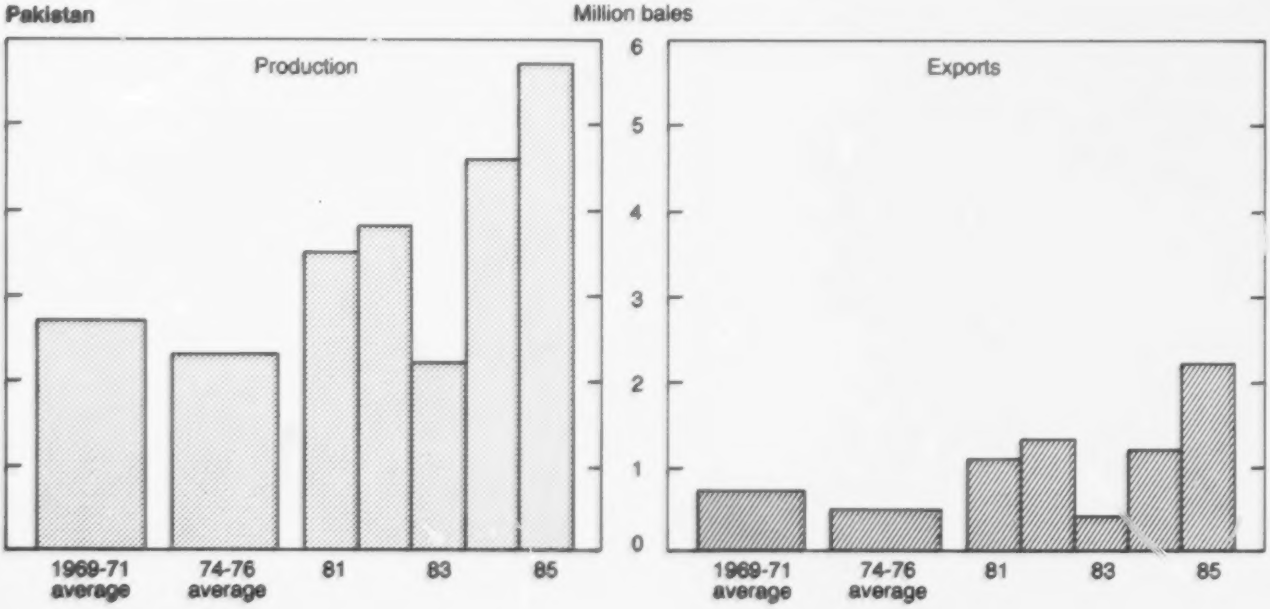
Cotton Export Competitors: Soviet Union and Pakistan

The Soviet Union ships over half of its cotton exports to other centrally planned countries (including Poland, East Germany, and Czechoslovakia). France and Japan are its largest markets in the free world. Pakistan had a sizeable portion of the Chinese market in the early 1980's, before China became self-sufficient.

Soviet Union



Pakistan



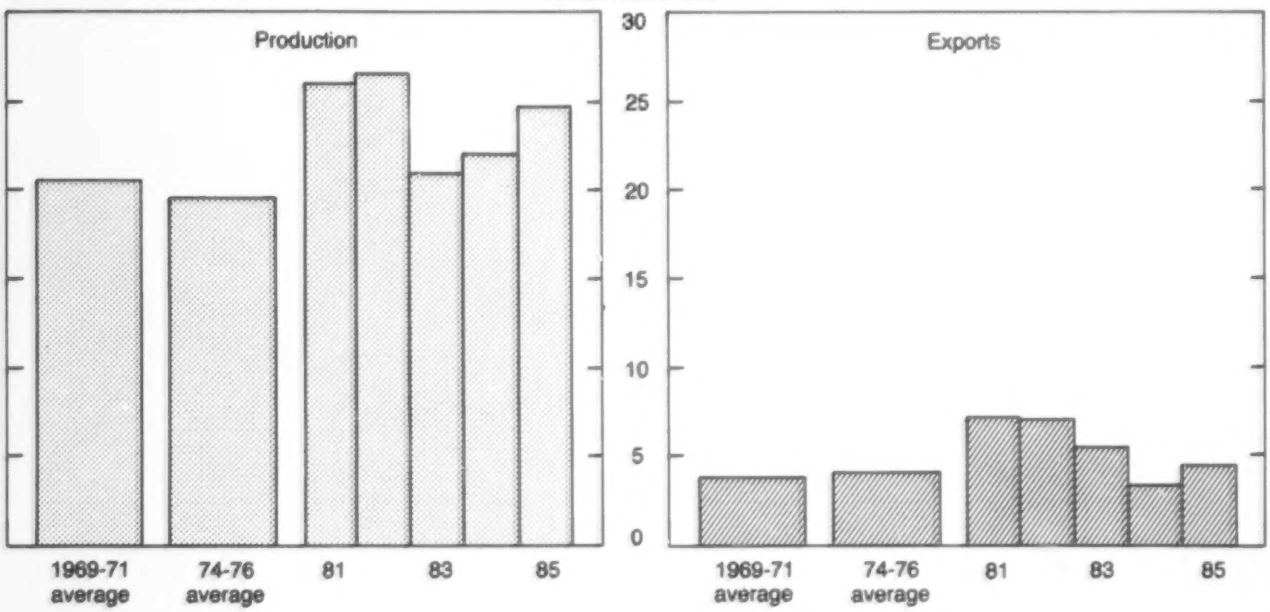
480-pound bales.

Chart 218

Coarse Grain Export Competitors: Canada and Argentina

The United States, which had a 66-percent share of the world coarse grains market during 1970-80, saw its share fall to 50 percent in 1985. Argentina is the second largest coarse grains exporter with 60 percent of its feed crops exported.

Canada



Argentina

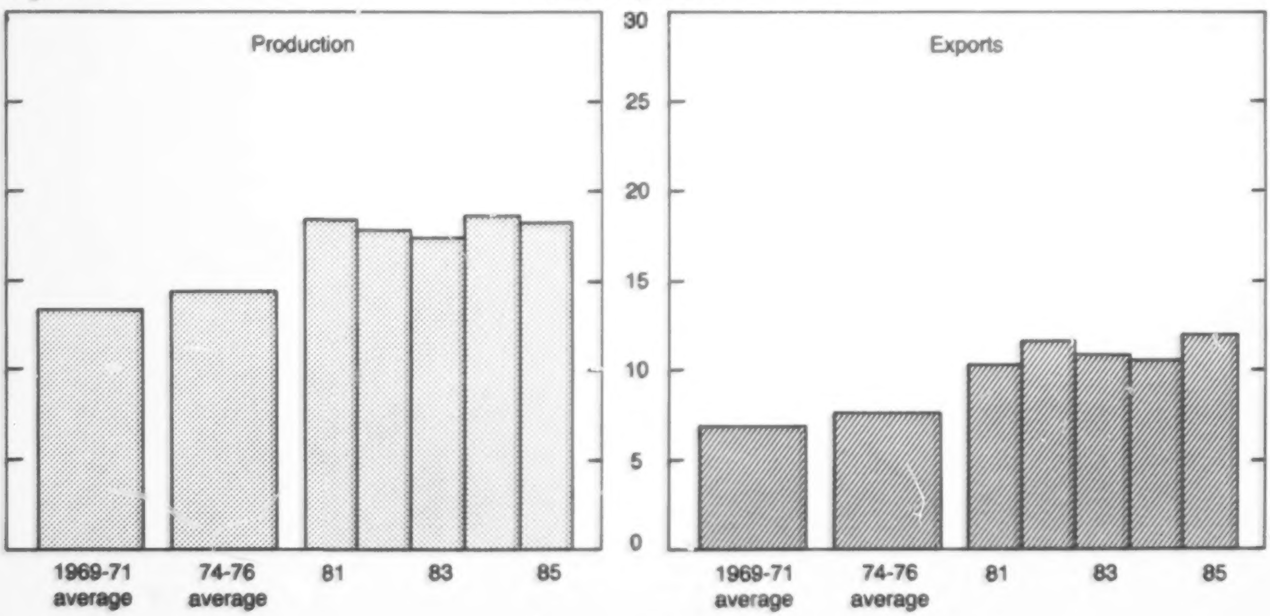
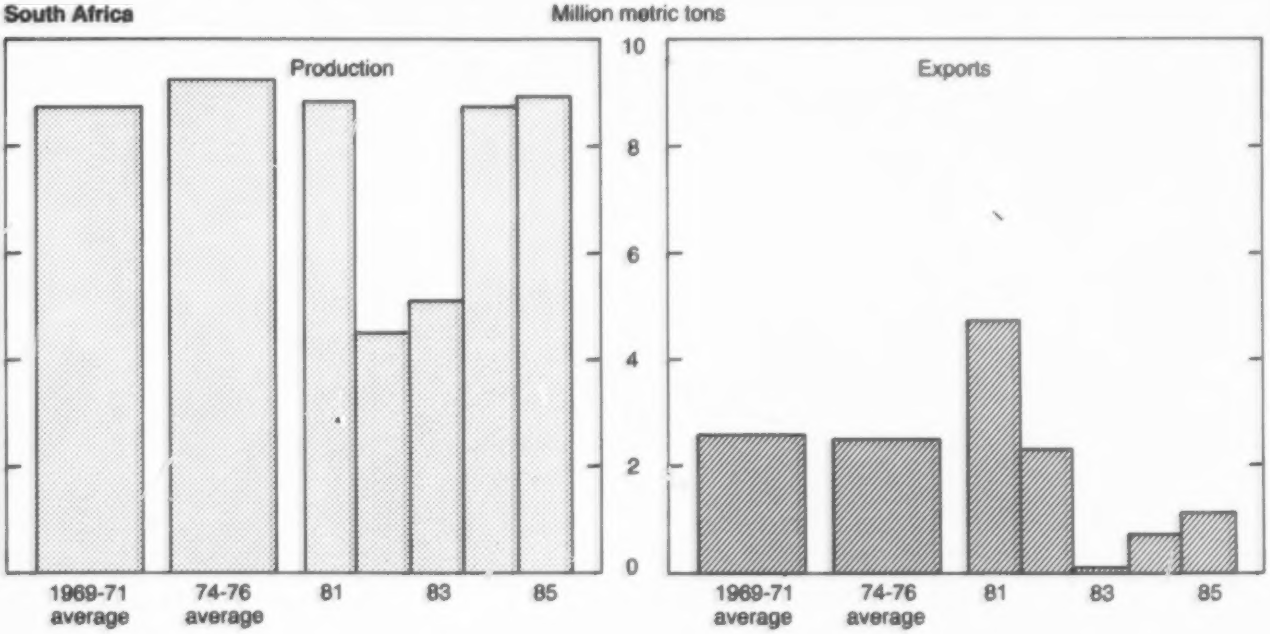


Chart 219

Coarse Grain Export Competitors: South Africa and Thailand

Canadian barley, Argentine corn and sorghum (see chart 218), Thai corn, and South African corn exports all increased in 1985. Two consecutive droughts in South Africa in 1982 and 1983 turned that country from a net exporter to a net importer temporarily.

South Africa



Thailand

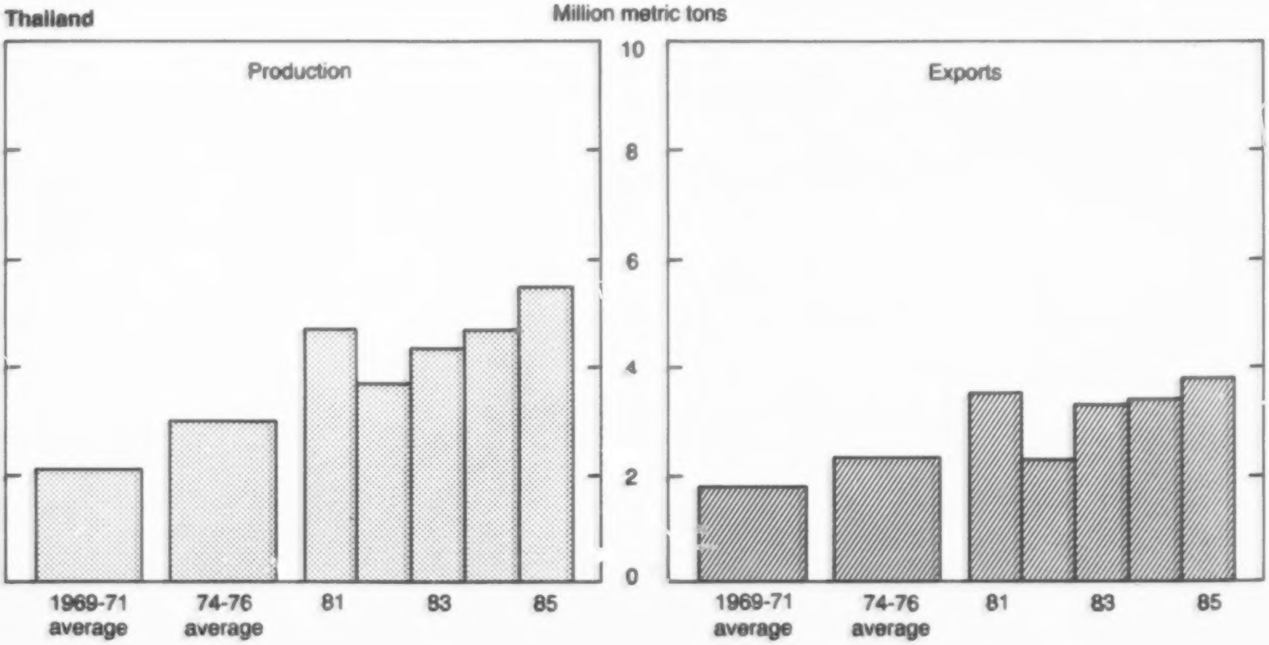
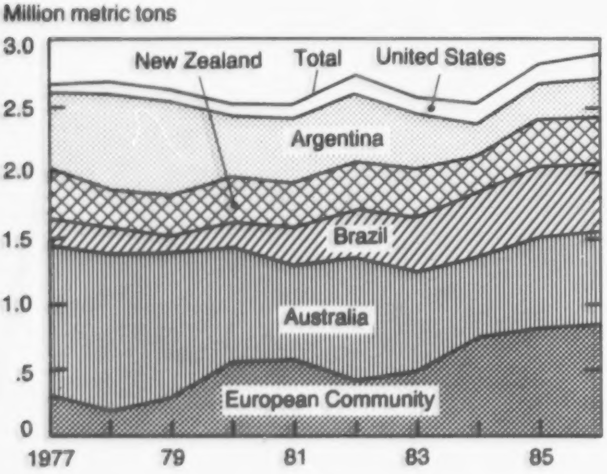


Chart 220

Beef and Veal Exports in Major Trading Countries

Beef and veal exports increased from 2.8 million metric tons in 1985 to an estimated 2.9 million metric tons in 1986.



1986 estimated. Carcass weight equivalent. European Community excludes intra-EC trade.

Chart 221

U.S. Exports of Livestock Products

Value of U.S. exports of livestock, meat, and meat products fell from $3.5 billion in 1984 to $3.4 billion in 1985.

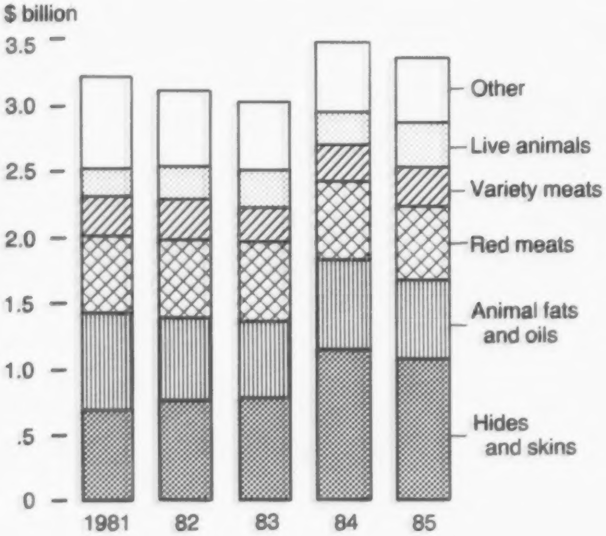
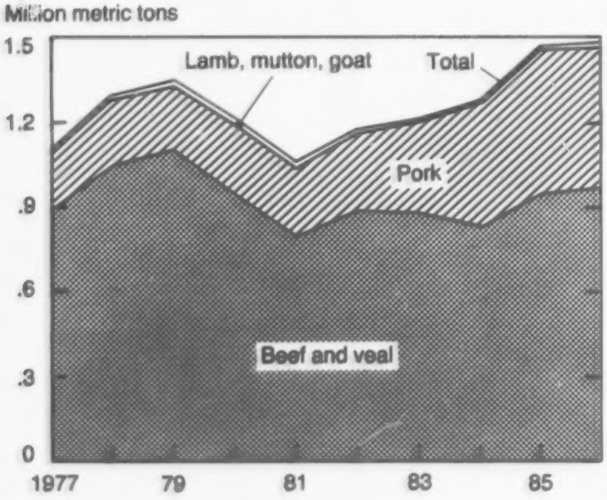


Chart 222

U.S. Imports of Red Meat

Increased beef and veal imports accounted for most of the increase in U.S. red meat imports during 1986.

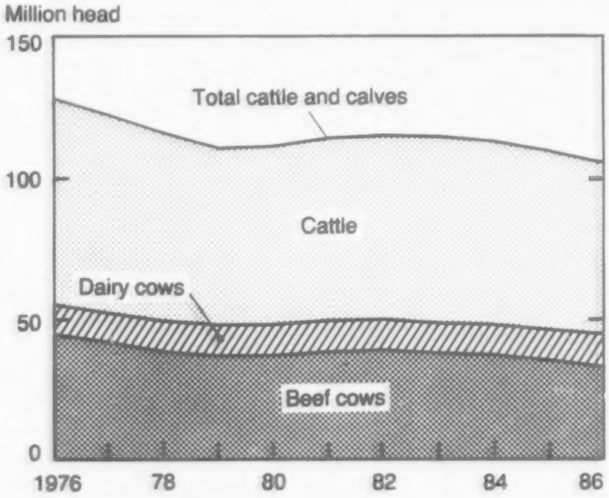


1986 estimated. Carcass-weight equivalent.

Chart 223

Cattle on Farms

A continued need to generate more cash flow by selling female stock and reduced dairy cow inventory under the Dairy Termination Program led to the 1986 inventory decline.

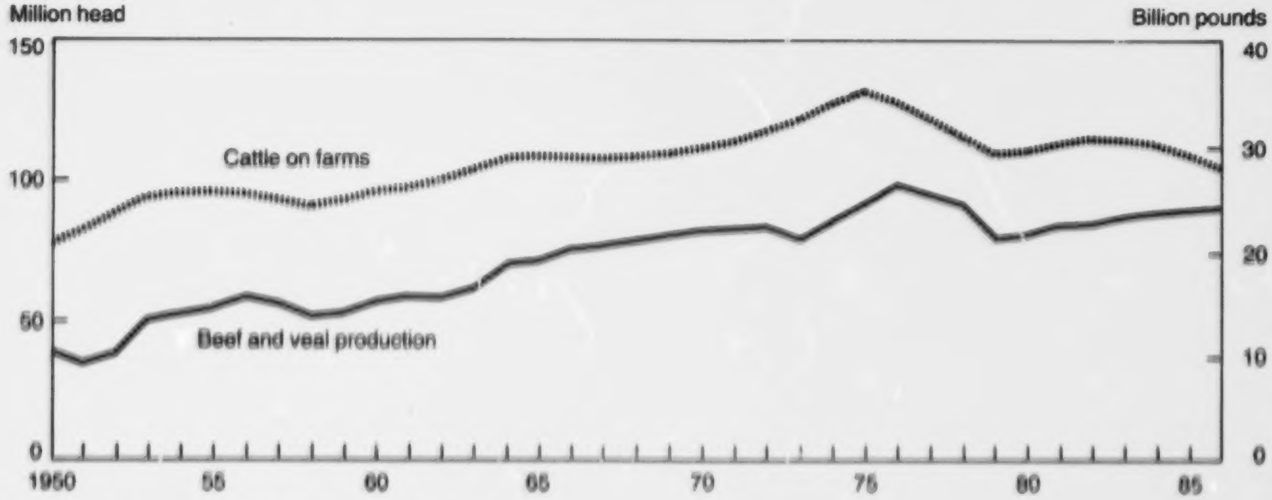


Cattle on farms as of January 1. Beef cows are those that have calved.

Chart 224

Cattle Numbers and Beef Production

Commercial beef production in 1985 increased 1 percent over 1984, as increased fed cattle slaughter weights more than offset a decline in nonfed cattle slaughter. Reduced fed cattle marketings will offset increased beef supplies.

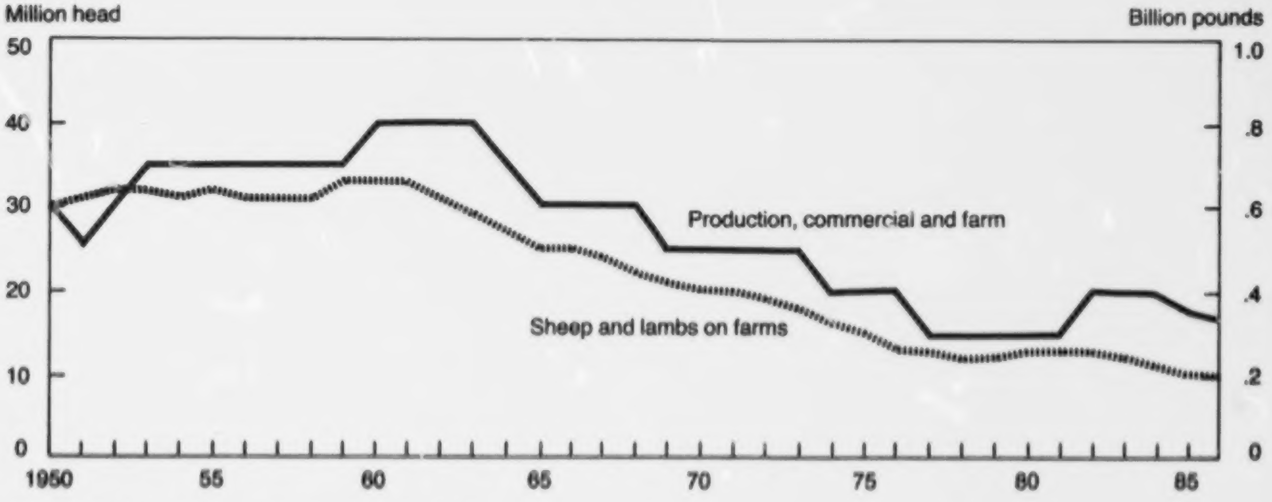


1986 production forecast. Cattle and calves on farms January 1.

Chart 225

Sheep Numbers, Lamb and Mutton Production

The number of sheep and lambs on farms was 9.9 million in January 1986, continuing the long-term trend of decreasing inventory, a trend which should continue into 1987. Lamb and mutton production in 1986 fell 6 percent from 1985.

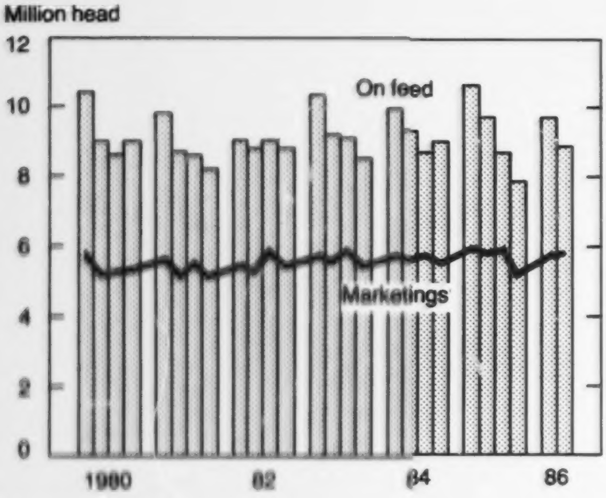


1986 production forecast. Sheep and lambs on farms January 1.

Chart 226

Cattle on Feed and Marketings

Fed cattle marketings remain large despite reduced feeder supplies and a smaller inventory of cattle on feed.

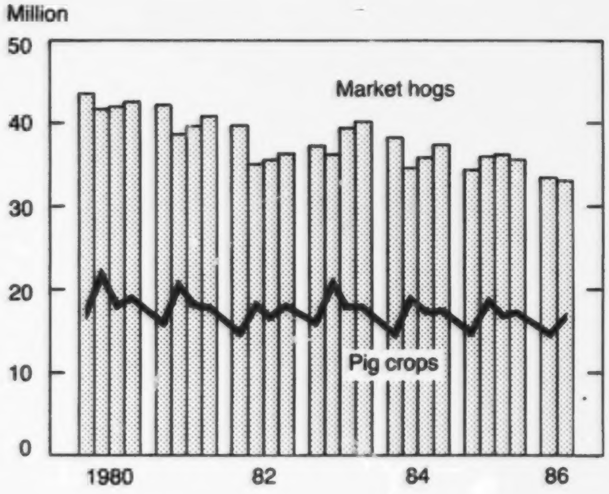


Quarterly data for 13 States.

Chart 227

Market Hogs and Pig Crops

The 1985 pig crop was about the same as in 1984, but is expected to fall moderately in 1986.

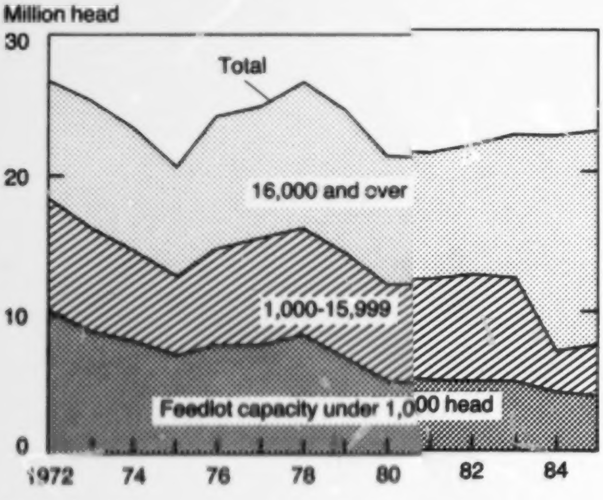


Quarterly data for 10 States.

Chart 228

Fed Cattle Marketed by Feedlot Capacity

Feedlots with less than 1,000 head capacity accounted for 97 percent of all feedlots in 1985 but marketed only 18 percent of fed cattle.



Data are for 13 States.

Chart 229

Livestock Prices Received by Farmers

Farm prices for cattle and hogs fell in 1985, but are expected to rise during the second half of 1986.

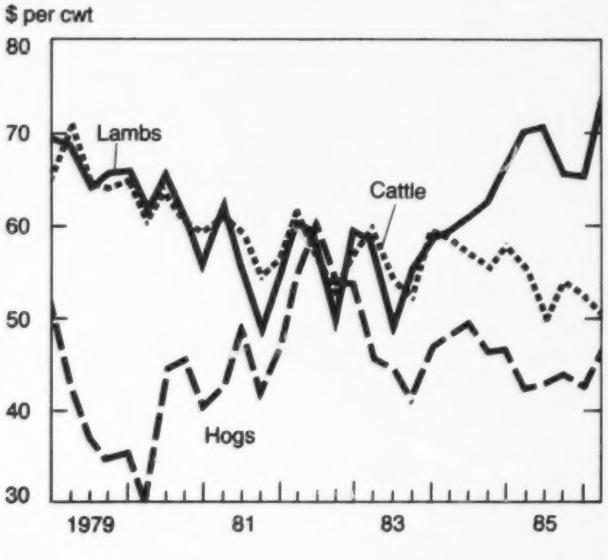
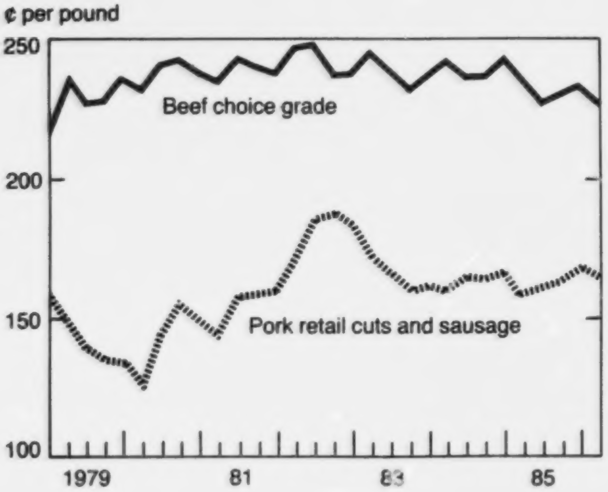


Chart 230

Retail Meat Prices

Record and near record meat supplies together with an expanding but sluggish economy continue to hold down price gains for the more expensive meats.

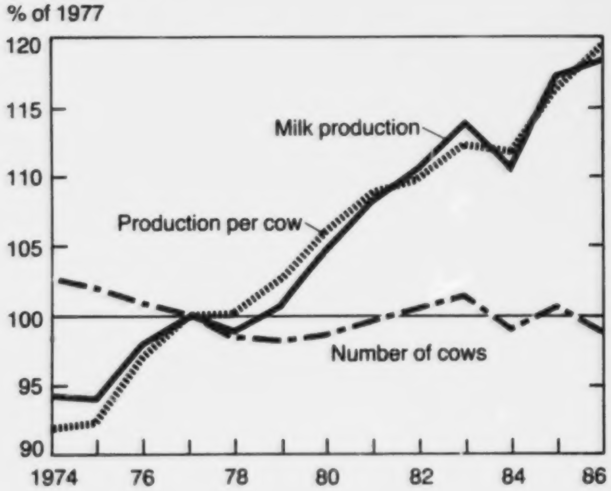


Composite price.

Chart 231

Milk Production, Number of Cows, and Milk per Cow

Reductions in cow numbers and milk production late in 1986 because of the Dairy Termination Program did not offset large increases in early 1986.



1986 forecast.

Chart 232

Global Dairy Stocks

Global dairy stocks increased 5 percent in 1985 despite a 20-percent reduction in U.S. stocks. The EC-10 accounts for almost 75 percent of stocks.

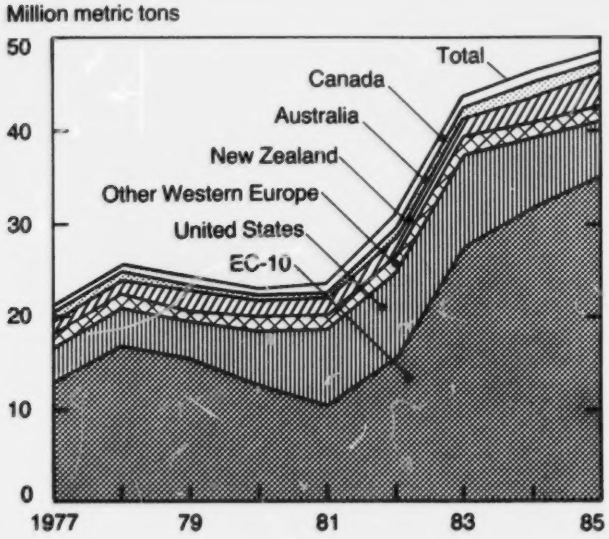
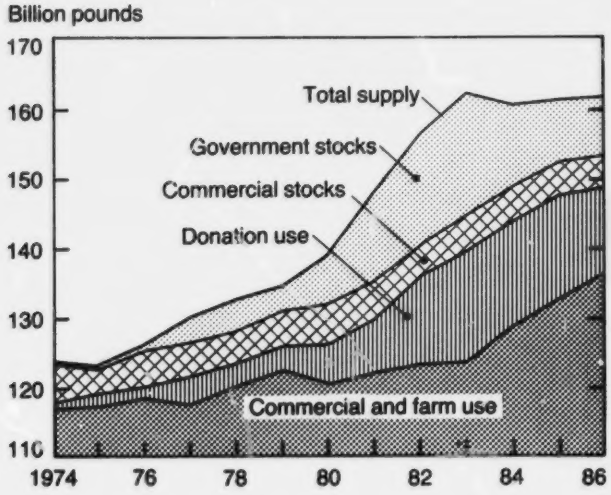


Chart 233

Milk Supply, Use, and Stocks

Slightly larger 1986 production kept total supply near the 1985 level. Greater commercial use and heavy donations pulled down Government stocks.

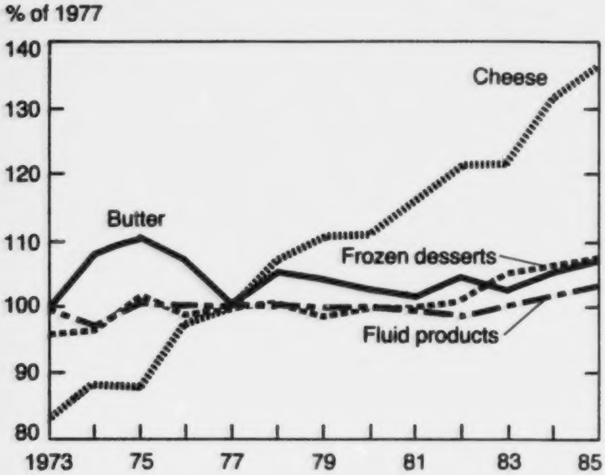


1986 forecast. Stocks as of December 31.

Chart 234

Dairy Product Sales

Sales of most major categories of dairy products have increased in recent years. Cheese sales were the only bright spot during the 1970's.

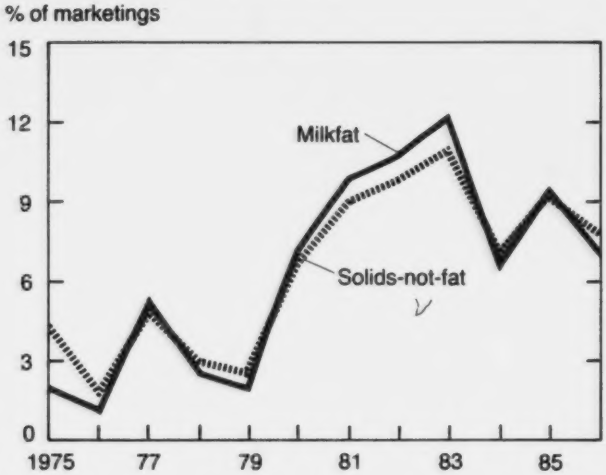


Fluid products include cream and specialty items. Cheese excludes cottage cheese.

Chart 235

Milk Solids Removed from the Market by CCC Programs

Government purchases in 1986 were reduced by the effects of the Dairy Termination Program and brisk commercial use, although the surplus remained large.



1986 forecast. Deliveries to the Commodity Credit Corporation (CCC) after domestic unrestricted sales.

Chart 236

Consumer Price Index for Dairy Products, Food, and All Items

Declining relative prices of dairy products have been a major factor boosting commercial use of milk and dairy products.

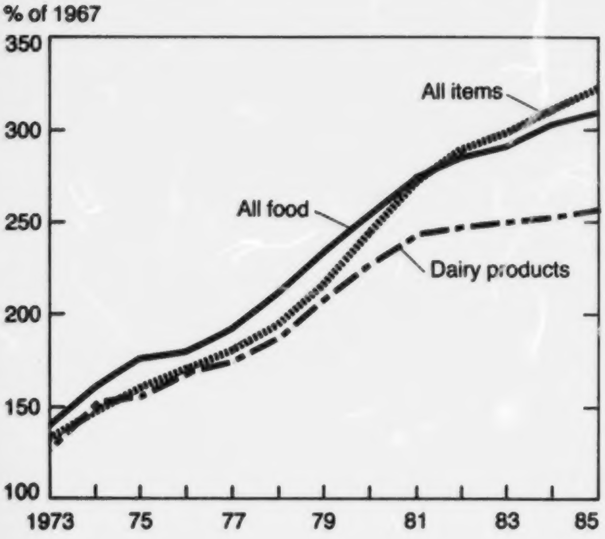
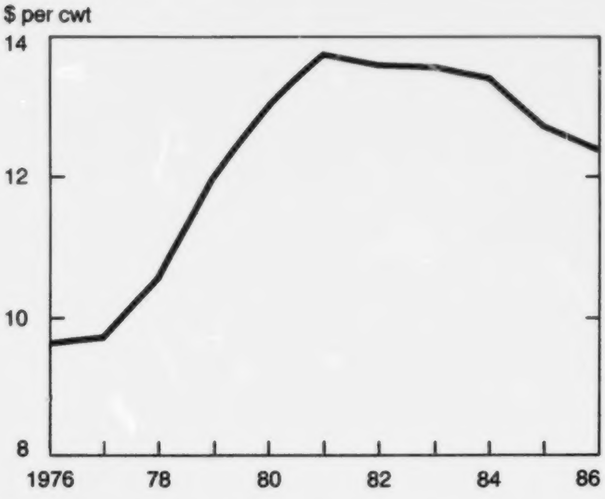


Chart 237

Milk Prices

Milk prices have continued to decline as the support price has been reduced.

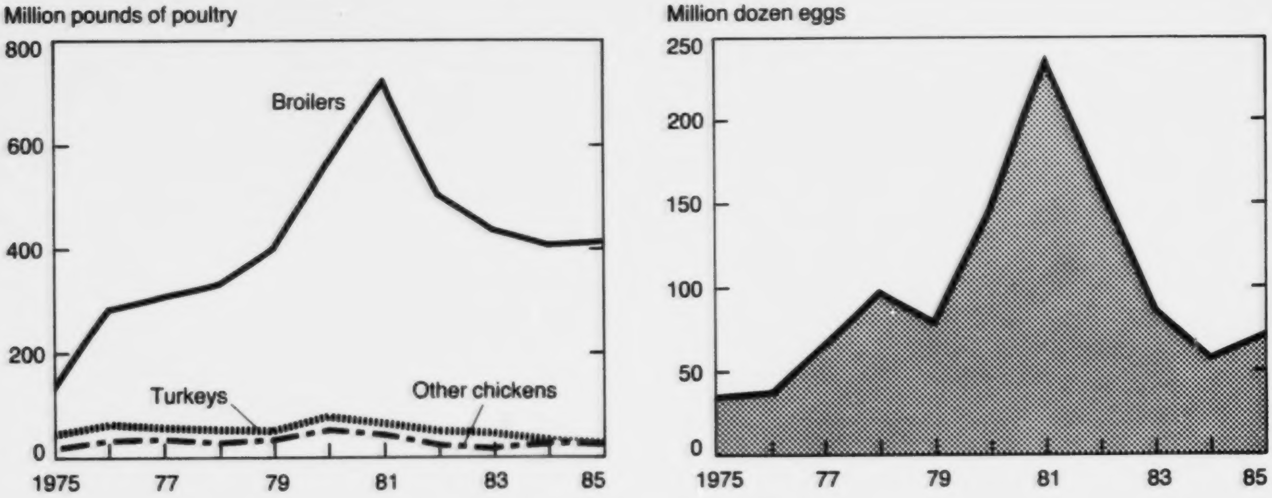


1986 forecast. Average price of all milk delivered to plants and dealers.

Chart 238

U.S. Exports of Poultry Products

Exports of poultry and eggs were both up in 1985. Lower U.S. prices in 1985 helped increase exports, in spite of a strong dollar relative to the Japanese yen, a major trading partner for broilers and eggs. Exports in 1986 are expected to rise as the dollar weakens relative to the yen.

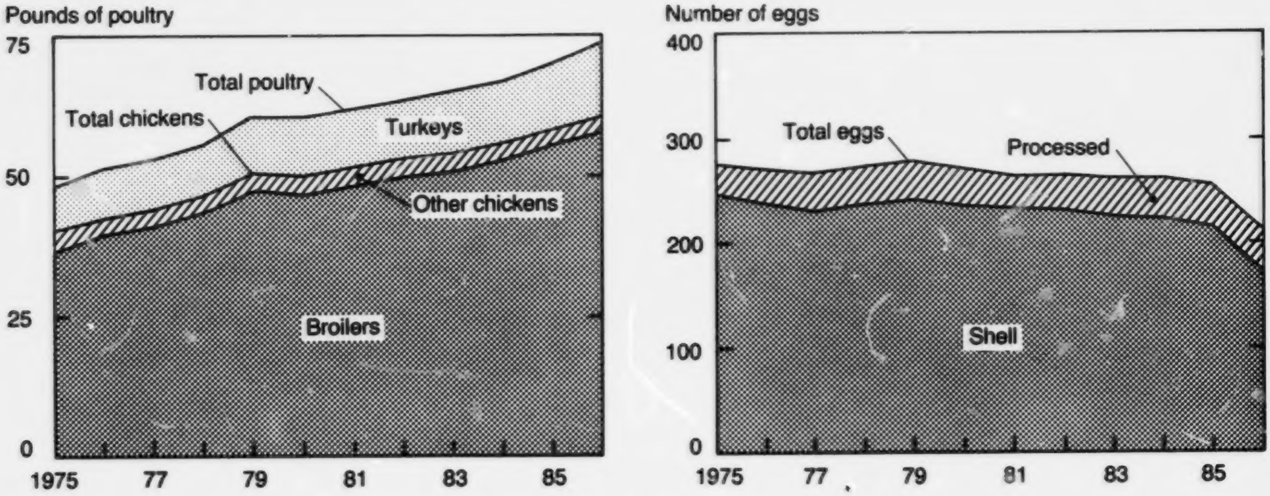


Poultry is ready-to-cook weight. Eggs are shell eggs plus shell-egg equivalent of egg products.

Chart 239

Per Capita Consumption of Poultry and Eggs

Per capita broiler consumption in 1985 increased over 2 pounds from 1984 and may rise another 2 pounds in 1986. Turkey consumption, at 11 pounds per person in 1985, may increase another 1.5 pounds in 1986.

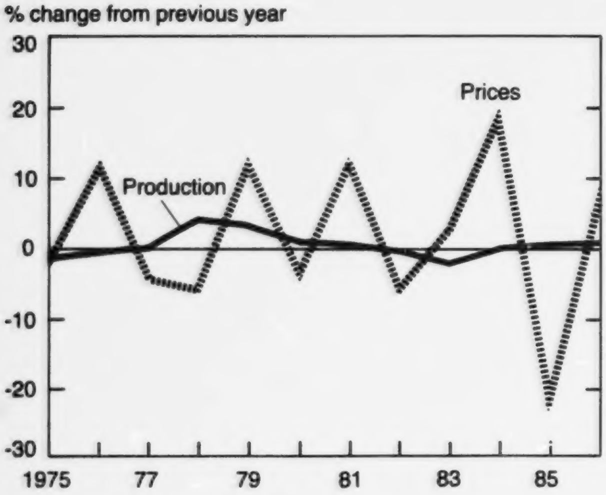


Poultry is ready-to-cook weight. Eggs are shell eggs plus shell-egg equivalent of egg products.

Chart 240

Eggs: Changes in Production and Farm Prices

The slight increase in 1985 egg production resulted in lower prices, especially with the strong dollar limiting exports. Prices in 1986 are expected to be up.

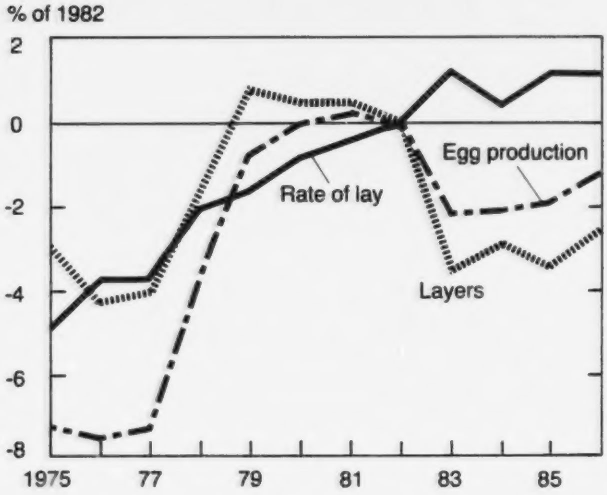


December 1, previous year, through November 30, current year.

Chart 241

Eggs: Rate of Lay, Production, and Number of Layers

Producers sold their least productive layers in 1985 in response to low egg prices. Rate of lay remained high while production was about the same.

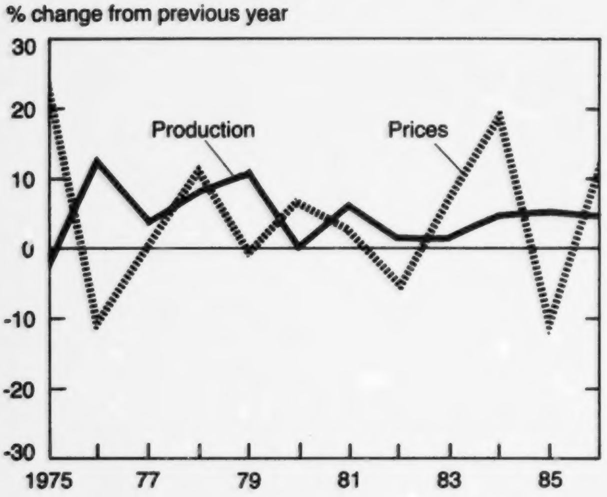


December 1, previous year, through November 30, current year.

Chart 242

Broilers: Changes in Production and Farm Prices

Stronger broiler prices in 1986 are due to increased demand, especially from restaurants, and the hot summer, which raised concern about reduced supplies.



December 1, previous year, through November 30, current year.

Chart 243

Turkeys: Changes in Production and Farm Prices

Strong prices and favorable returns during 1984-86 encouraged increased turkey production. Increased supplies in 1986 may lead to a slight decline in prices.

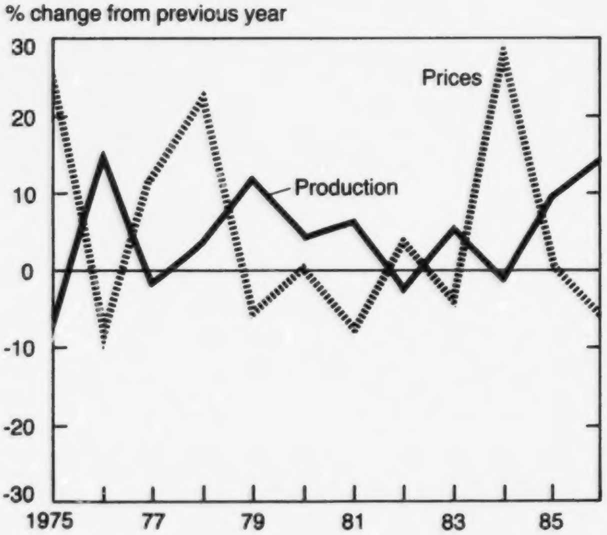
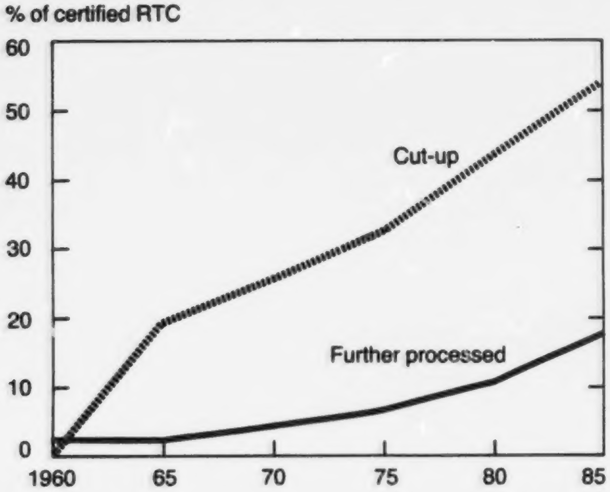


Chart 244

Young Chickens: Percentage Cut-Up and Used in Further Processing

Sales of young chicken have shifted from whole birds to cut-up parts. Further processed chicken products are also growing in sales.

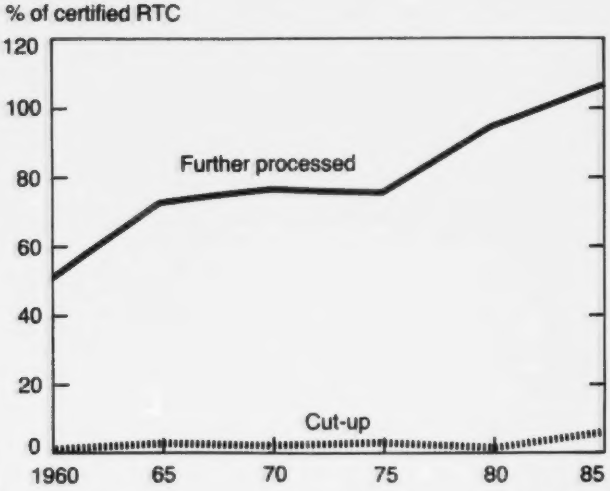


Pounds of certified ready-to-cook (RTC).

Chart 245

Mature Chickens: Percentage Cut-Up and Used in Further Processing

Mature chicken is more flavorful than young chicken and is used to make soups and other products. Little is sold as whole birds.

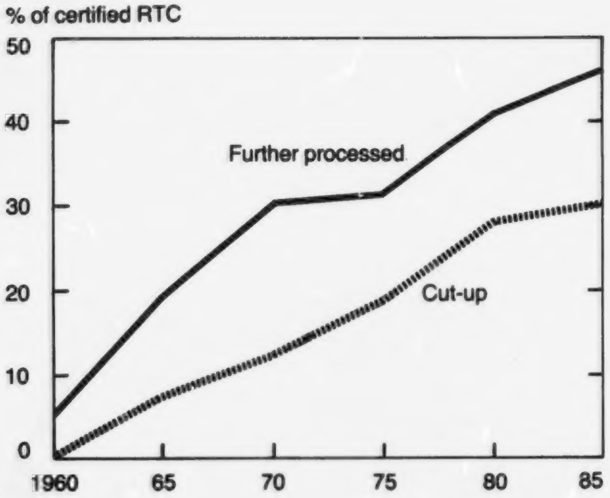


Pounds of certified ready-to-cook (RTC).

Chart 246

Turkeys: Percentage Cut-Up and Used in Further Processing

Percentage of turkeys cut-up and further processed is increasing over the long term, with further processed rising the fastest.



Pounds certified ready-to-cook (RTC).

Chart 247

Egg Products: Percentage Frozen, Liquid, and Dried

Changes in energy prices in the early 1970's led to more egg products being produced as liquid and fewer as frozen or dried.

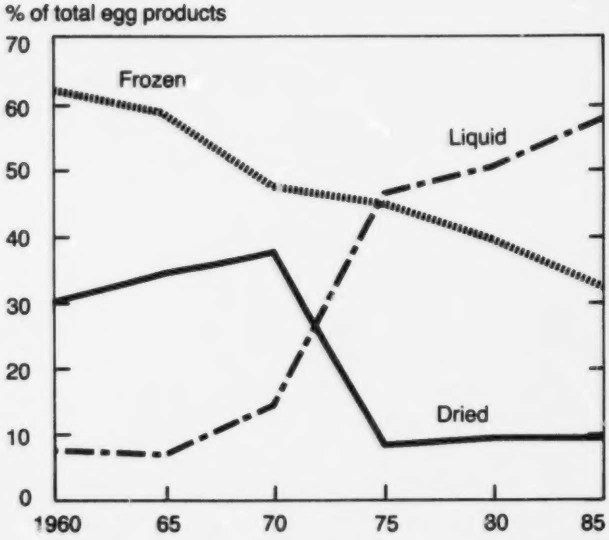
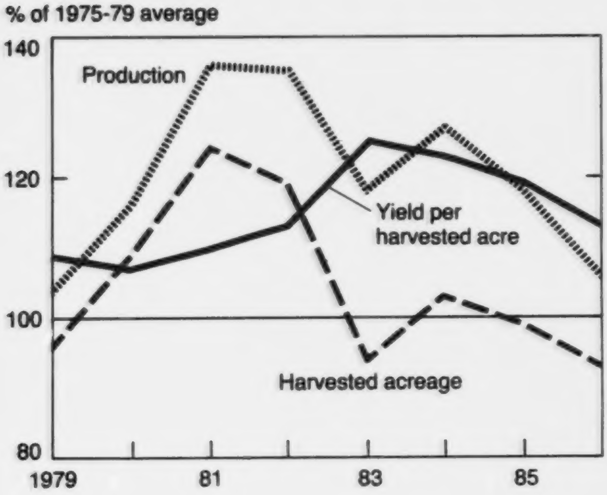


Chart 248

U.S. Wheat Acreage, Yield, and Production

Low wheat prices encouraged producers to participate heavily in the 1986 acreage reduction program. Harvested acreage is consequently the smallest in seven seasons.

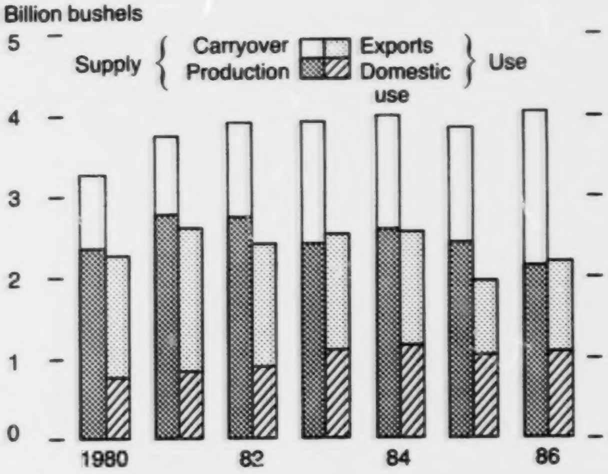


Crop year beginning June 1. September 1, 1986, indications.

Chart 249

Wheat Supply and Use

With the smallest wheat crop in 6 years, wheat use in 1986/87 is likely to exceed production for only the second time in the last 7 years.

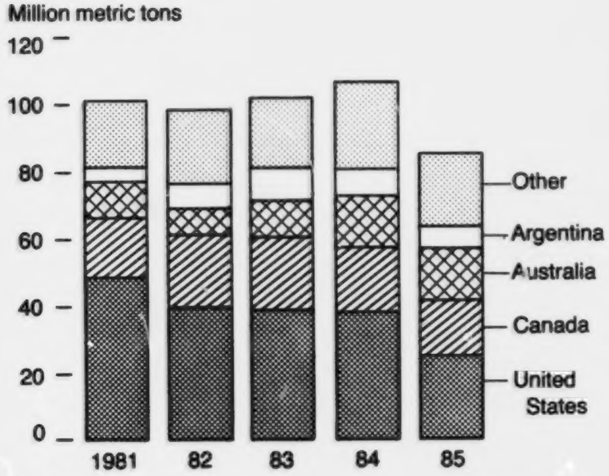


1985 preliminary, 1986 projected. Supply includes imports. Year beginning June 1.

Chart 250

Major Wheat Exporters

World wheat trade fell to 88 million tons in 1985, as U.S. exports declined substantially, while exports of our major competitors increased.

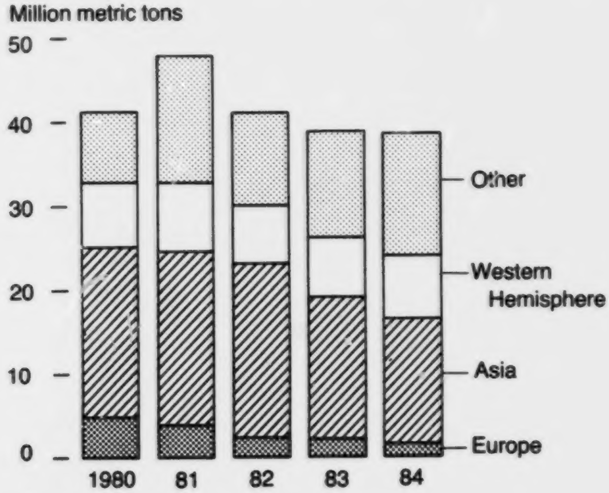


1984 preliminary, 1985 forecast. Marketing year beginning July 1. Grain equivalent.

Chart 251

Destination of U.S. Wheat Exports

U.S. wheat shipments in 1984 remained virtually the same at 39 million tons. Shipments to Asia and Europe fell, while those to Western Hemisphere and elsewhere rose.

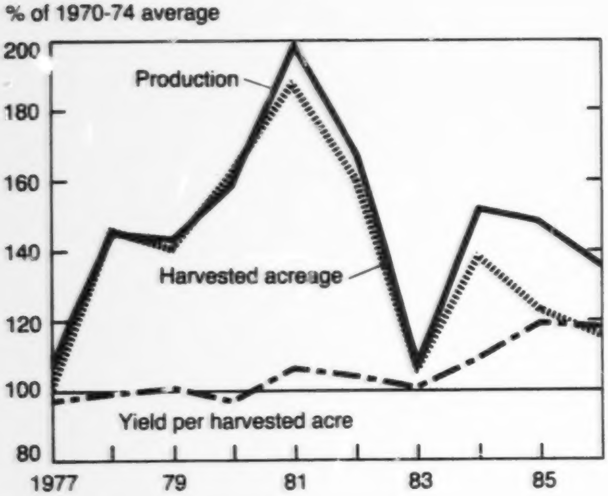


Grain equivalent. Marketing year beginning June 1.

Chart 252

U.S. Rice Acreage, Yield, and Production

U.S. rice production and harvested acreage declined in 1986, while yields remained relatively flat.

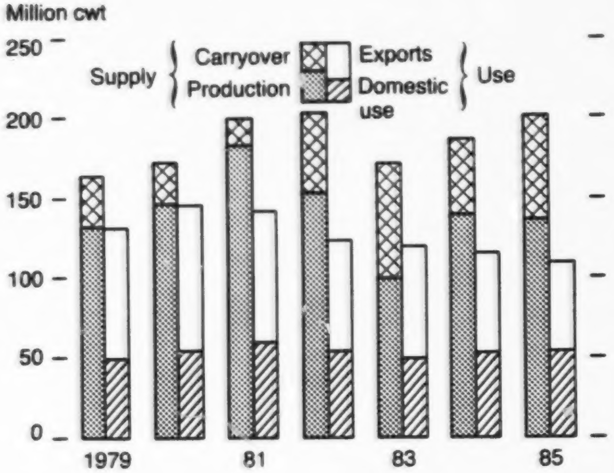


August 1, 1986, indications.

Chart 253

Rough Rice Supply and Use

Supplies of rice were up 8 percent in 1985, or about 203 million cwt. Use was about the same as a year ago.

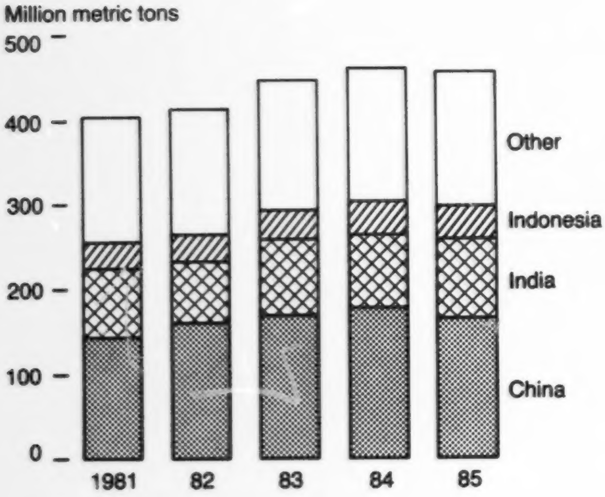


Year beginning in August 1. Supply includes imports.

Chart 254

Major Rice Producers

World rice production fell 4 million tons in 1985 from the record 462 million tons in 1984.

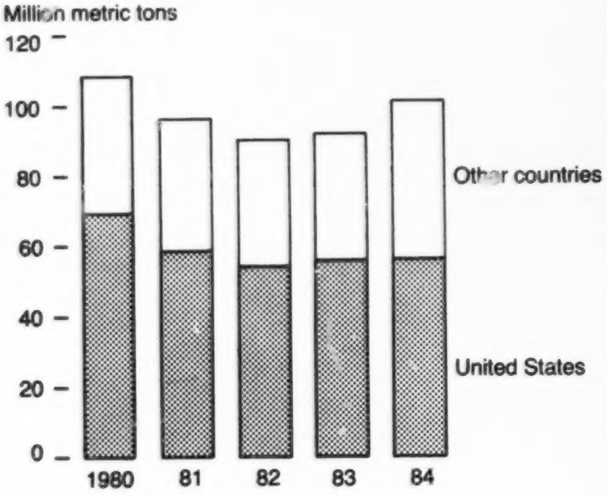


1985 preliminary. Data are for rough rice. Crop years.

Chart 255

World Exports of Coarse Grains

World coarse grains exports rose to their second highest level in 1984, with record demand from the Soviet Union. U.S. exports were stable while EC-10 exports doubled.

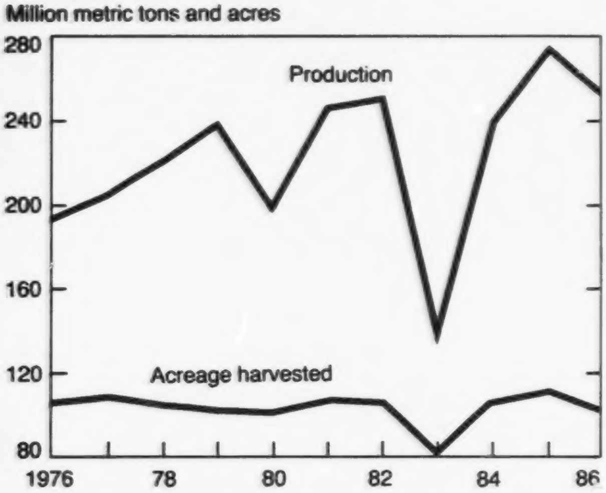


Excludes intra-EC trade. Marketing year beginning October 1.

Chart 256

Feedgrain Production and Acreage

The 1986 feedgrain harvest was about 253 million metric tons, down 7 percent from 1985. Area harvested should total 102.6 million acres, with higher average yield.

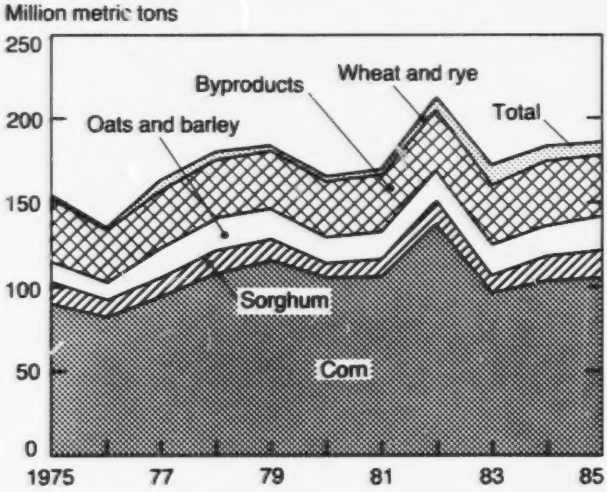


August 1, 1986 , indications. Year beginning September 1.

Chart 257

Feed Concentrates Fed to Livestock and Poultry

Consumption of feed concentrates rose 1 percent in 1985/86, with increases in most categories except wheat.

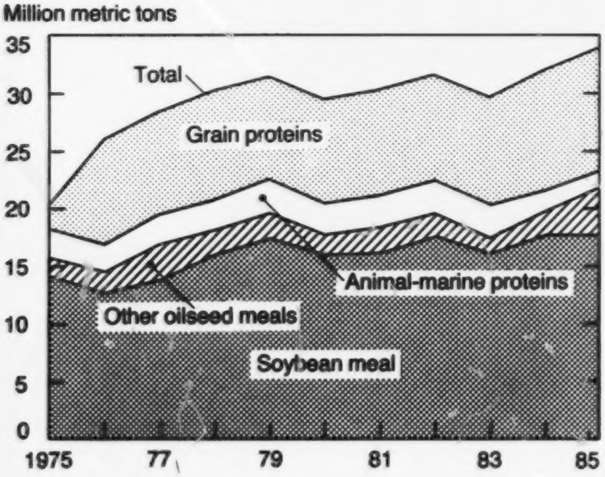


1985 preliminary. Year beginning September 1.

Chart 258

High-Protein Feed Use

High-protein feed use during 1985 should remain stable. Consumption may be 23.7 million tons, including 17.5 million tons of soybean meal.

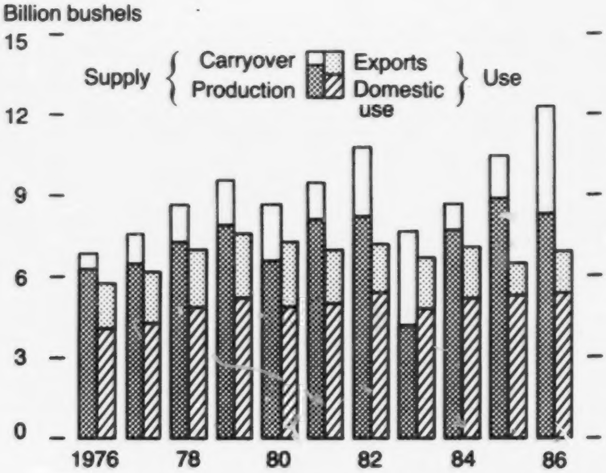


1985 preliminary, 1986 projected. Year beginning October 1. 44-percent crude protein equivalent.

Chart 259

Corn Supply and Use

Corn supply for 1986 should total 12.3 billion bushels, up almost 2 billion from 1985.

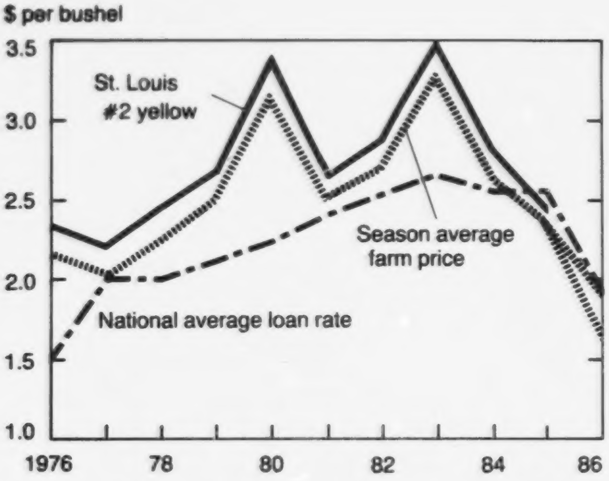


1985 estimated, 1986 projected. Supply includes imports. Year beginning September 1.

Chart 260

Corn Prices

Farm corn prices in 1986 will be supported by loan rates, and deficiency payments will account for a major part of producers' net income.

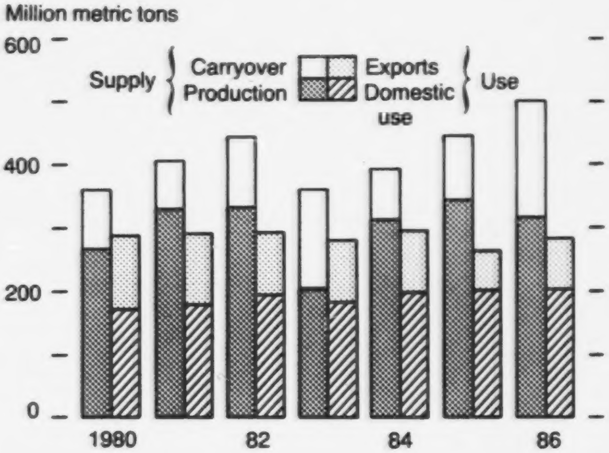


1985 estimated, 1986 range projected. Year beginning September 1. 1985 St. Louis #2 yellow based on September July average.

Chart 261

Total Grain Supply and Use

Feedgrain ending stocks are projected to build to 94 million tons next season, up 34 percent from 1985/86.

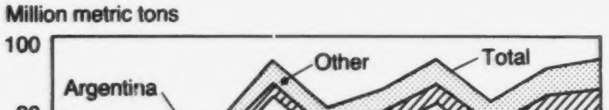


1985 preliminary, 1986 projected. Supply includes imports. Year beginning September 1 for corn and sorghum; June 1 for oats, barley, wheat, and rye; and August 1 for rice.

Chart 262

Major Soybean Producers

U.S. soybean production rose almost 13 percent and Argentina's hit a record 7.3 million tons in 1985/86. Brazil's production was down 29 percent due to drought.

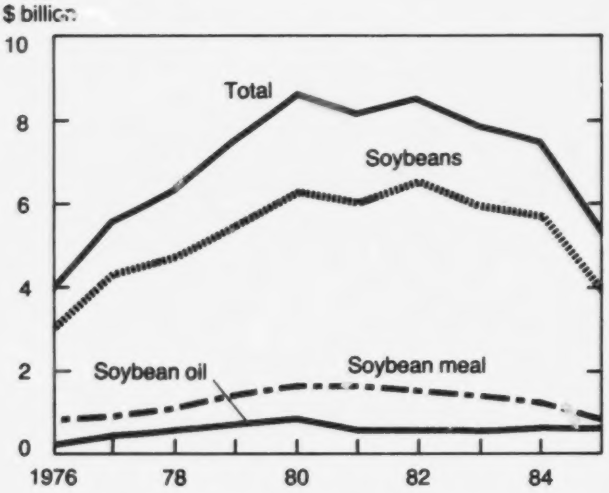


1985/86 preliminary. Soybean production split year includes Northern Hemisphere crops harvested in the last months of the first year shown and Southern Hemisphere crops harvested early in the following year.

Chart 263

Value of U.S. Exports of Soybeans and Products

The value of U.S. soybeans and products exports was $5.3 billion in fiscal 1985, down 29 percent from the previous year.

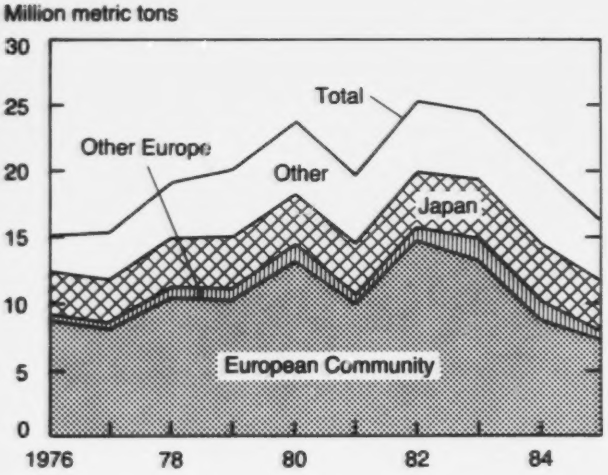


Fiscal years.

Chart 264

Destination of U.S. Soybean Exports

U.S. soybean exports totaled 16.3 million metric tons in 1985, down nearly 4 million tons, or 19 percent. Shipments to the European Community were down for the third straight year.

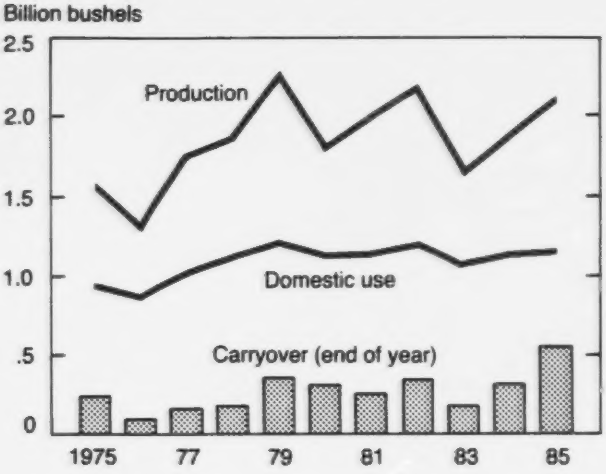


Marketing year September-August. Other includes Canada and the Soviet Union.

Chart 265

U.S. Soybean Production, Use, and Carryover

U.S. soybean production in 1985 exceeded 2 billion bushels for only the third time in history. This level was obtained on 62 million acres; yields hit a record 34.1 bushels per acre.

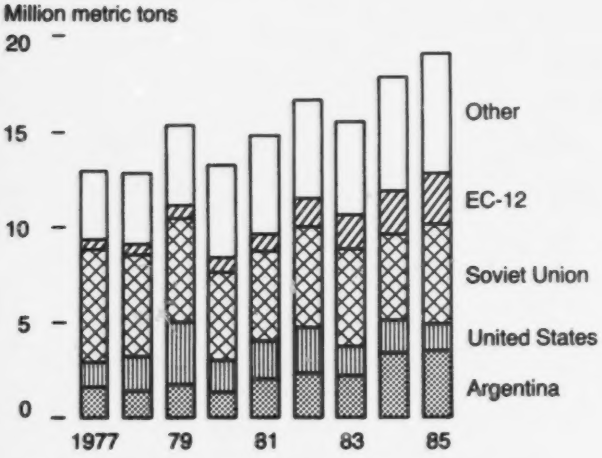


Domestic use includes crushings, seed, feed, and residual. Year beginning September 1.

Chart 266

World Production of Sunflowerseed

World sunflowerseed production hit a record 19.1 million metric tons in 1985, up 7 percent. All the increase came outside the United States, as U.S. production fell 4 percent.

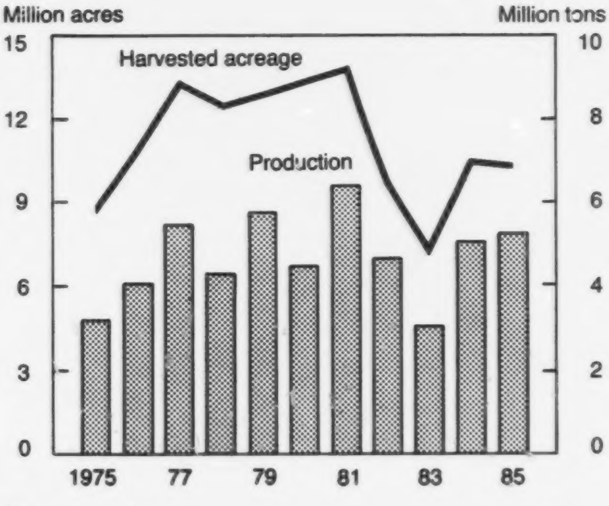


1985 preliminary. Sunflowerseed production year includes Northern Hemisphere crops harvested in the last months of the year shown and Southern Hemisphere crops harvested early in the following year.

Chart 267

U.S. Cottonseed Acreage and Production

U.S. cottonseed production climbed to 5.3 million tons in 1985, despite a decline in harvested acreage to 10.2 million acres. Yields were a record high 0.52 tons per acre.

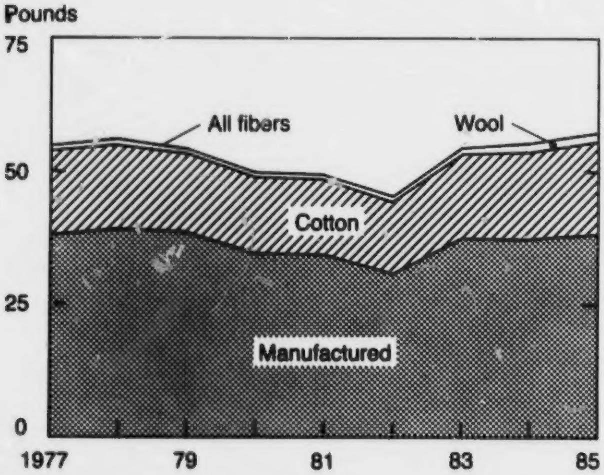


Year beginning August 1.

Chart 268

U.S. per Capita Consumption of Fibers

U.S. per capita domestic consumption of all fibers in 1985 was record high at 57 pounds.

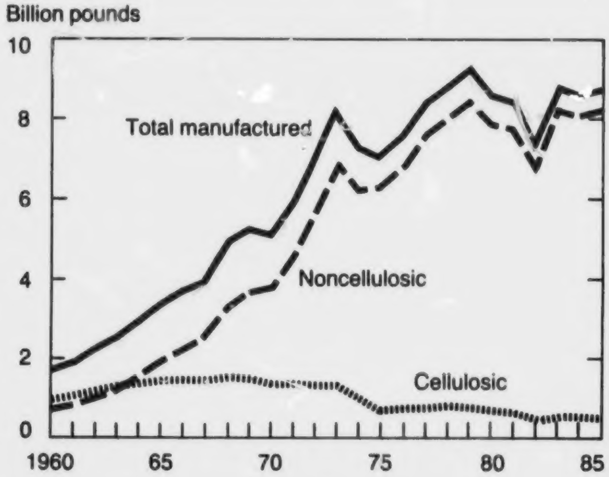


1985 preliminary. Mill consumption adjusted for fiber equivalent of trade balance in textile manufactures. All fibers do not include flax and silk.

Chart 269

U.S. Shipments of Manufactured Fiber

The very slight increase in domestic shipments of manufactured fibers was in nylon and olefin filament use in carpets in 1985.

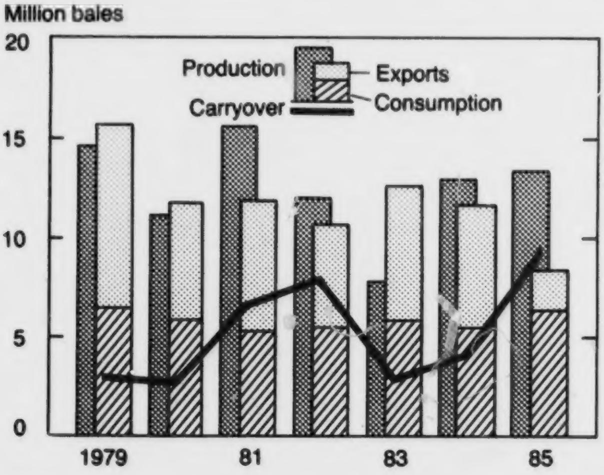


Nylon, polyester, acrylic, olefin, glass, and spandex are noncellulosic fibers. Rayon and acetate are cellulosic fibers. Shipments to domestic customers.

Chart 270

U.S. Cotton Production, Use, and Carryover

U.S. cotton production was 13.4 million bales during 1985, with a record-high yield of 630 pounds per acre. World cotton production was an estimated 79 million bales.

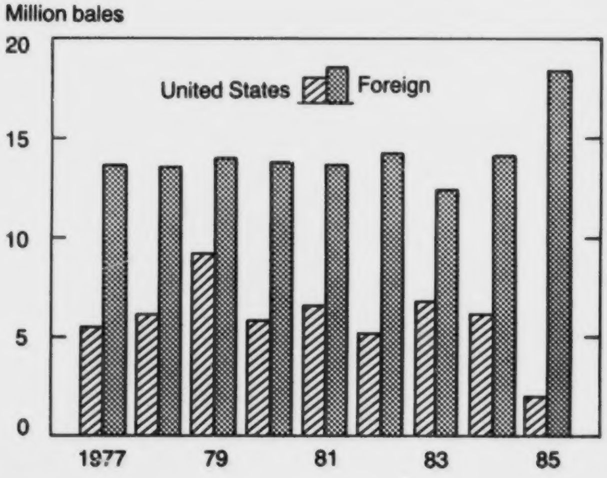


1985 preliminary. Bales of 0.218 metric tons (480 pounds net). Year beginning August 1. Ending carryover.

Chart 271

World Cotton Exports

U.S. cotton exports slumped to their lowest level in years as uncompetitive pricing allowed foreign competitors to erode U.S. export markets in 1985.

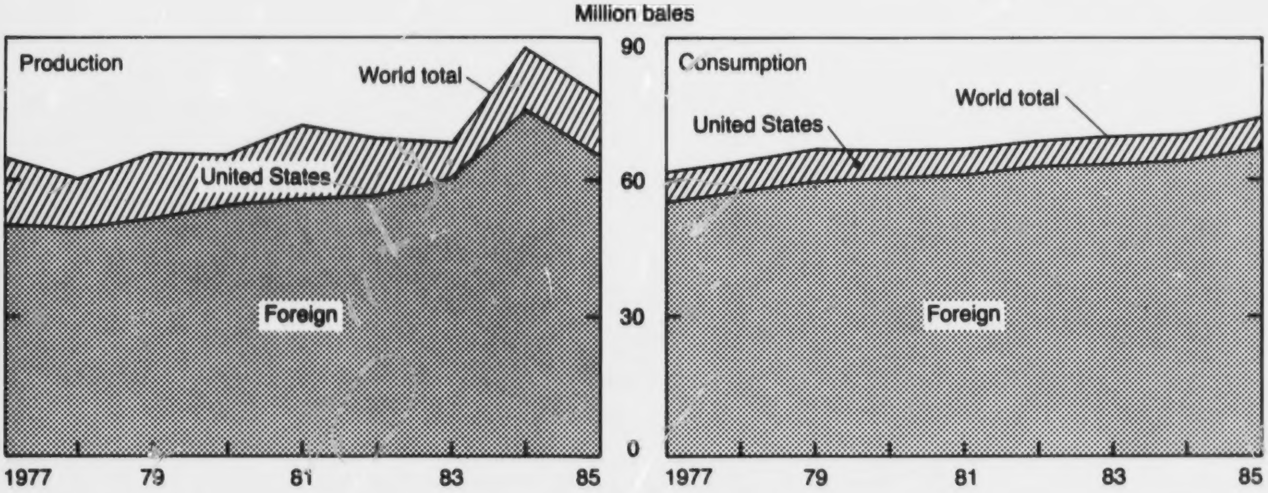


1985 preliminary. Bales of 0.218 metric tons (480 pounds net). Year beginning August 1.

Chart 272

World Cotton Production and Consumption

U.S. cotton yields climbed to a record 630 pounds per acre in 1985. Area harvested fell slightly, and production totaled 4 percent above 1984. Declining world production reflected sharp drops in Chinese and Brazilian cotton crops.

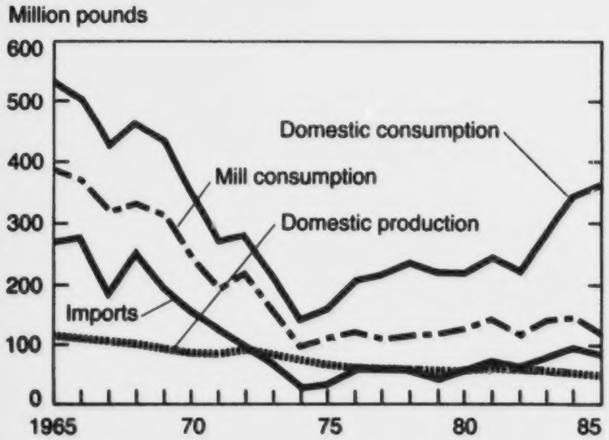


1985 estimated. Bales of 0.218 metric tons (480 pounds net). Year beginning August 1.

Chart 273

U.S. Production, Imports, and Consumption of Raw Wool

Raw wool prices fell in 1985 as mill demand was off 18 percent from 1984 and imports of wool-containing textile products increased 23 percent.

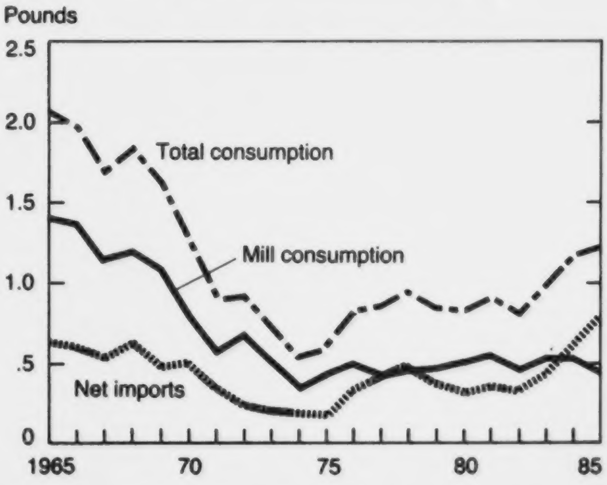


1985 estimated. Clean basis. Production includes shorn and pulled wool. Imports include duty-free and dutiable wool. Mill consumption includes apparel and carpet wool. Domestic consumption includes mill consumption plus raw wool equivalent of net textile trade balance.

Chart 274

U.S. per Capita Consumption of Apparel Wool

U.S. per capita total consumption of apparel wool textile products rose 6 percent in 1985 as a result of a 27-percent increase in net apparel wool textile product imports.

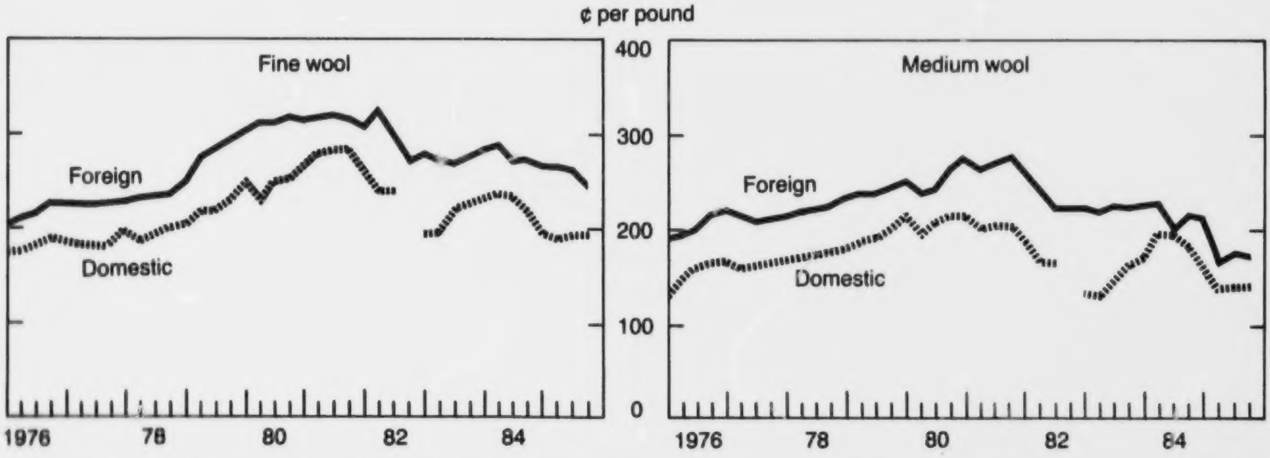


Mill consumption of raw wool plus raw wool equivalent of net imports of apparel wool textiles.

Chart 275

Wool Prices

Stronger world demand for fine wool in 1985 meant that its prices fell less than for foreign medium wool.

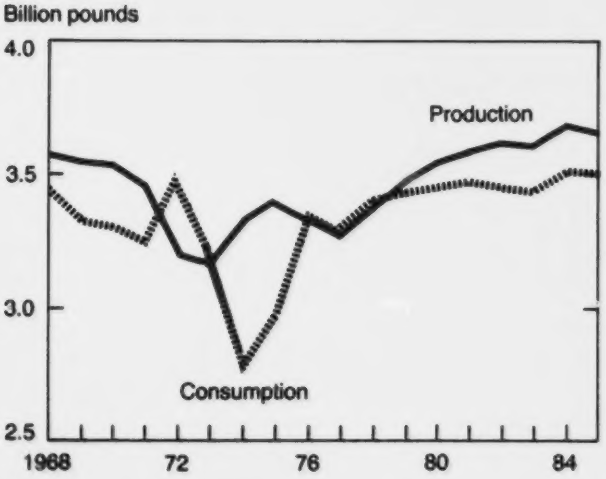


Clean basis. For fine wool: graded territory 64's (20.60-22.04 microns) staple 2-¾" and up delivered to U.S. mills. Australia 64's, type 62 duty-paid delivered to U.S. mills. For medium wool: graded territory 58's (24.95-26.39 microns) staple 3-¼" and 60's (23.50-24.95 microns) staple 3" and up delivered to U.S. mills; Australia 58/60's type 423/3 duty-paid delivered to U.S. mills. Price not quoted for domestic wool, fourth quarter 1982.

Chart 276

World Production and Consumption of Raw Wool

Most of the reduction in world wool production in 1985 was from New Zealand and the Soviet Union's clips.

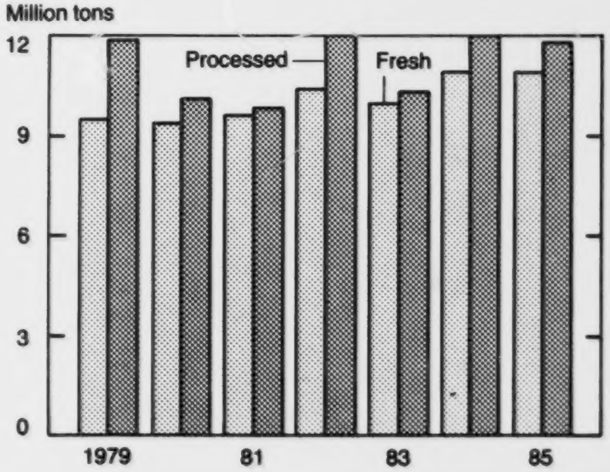


1985 preliminary. Clean content weight. Production data on a marketing year basis.

Chart 277

Fresh and Processed Vegetable Production

Total vegetable production fell fractionally in 1985 to 22.7 million tons. Total value of production fell 4 percent to $3.97 billion.



Fresh includes melons. Excludes other commercial production in States where estimates are not made separately.

Chart 278

Dry Bean Production and Price

Higher dry bean production during 1985/86 was primarily a result of increased exports to Argentina and Mexico, which suffered from a poor crop.

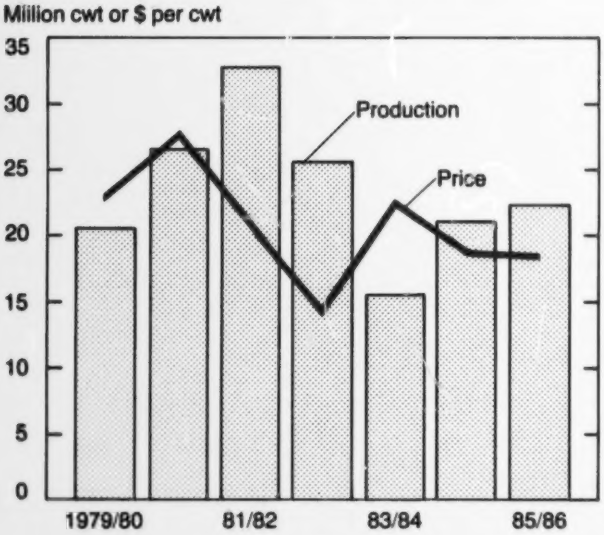


Chart 279

Destination of U.S. Fresh Vegetable Exports

U.S. fresh vegetable exports fell 26 percent in 1985, with smaller shipments to Canada and Japan. Lettuce, onions, and tomatoes were the principal items exported.

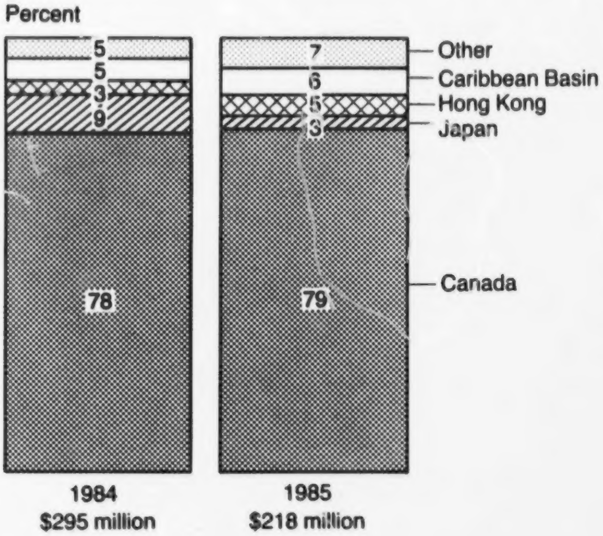
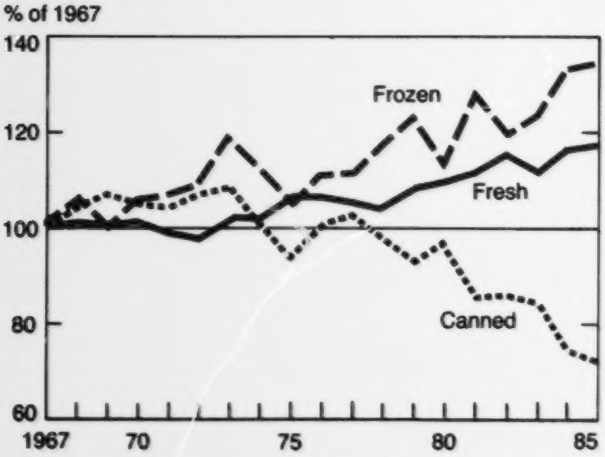


Chart 280

Per Capita Consumption of Vegetables

Fresh and frozen vegetable consumption both rose 1 percent in 1985. Canned vegetable consumption has dropped 28 percent since 1967.

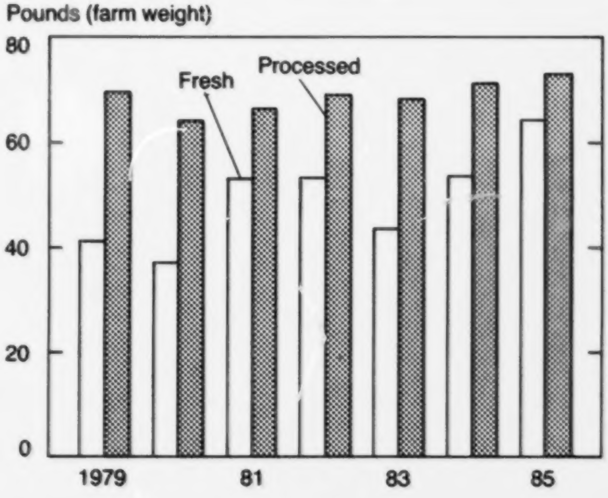


Index is calculated by weighting individual items with 1967-69 and 1977-79 retail prices. Based on estimates of food available for consumption, not adjusted for waste beyond the retail level.

Chart 281

Per Capita Utilization of Potatoes

Per capita potato use in 1985, in both fresh and processed forms, rose 10 percent to 138 pounds. The 1985 potato crop was a record 404.1 million cwt.

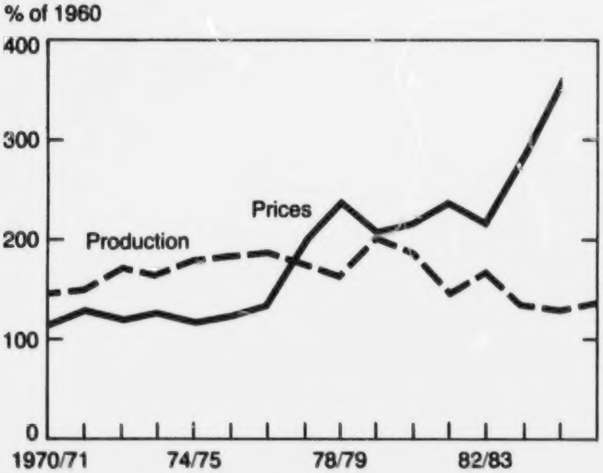


1985 preliminary. Processed on farm-weight basis.

Chart 282

Citrus Fruit Production and Farm Prices

The 1985/86 citrus fruit production, at 11 million tons, was up 6 percent, primarily because of a 15-percent increase in Florida oranges.

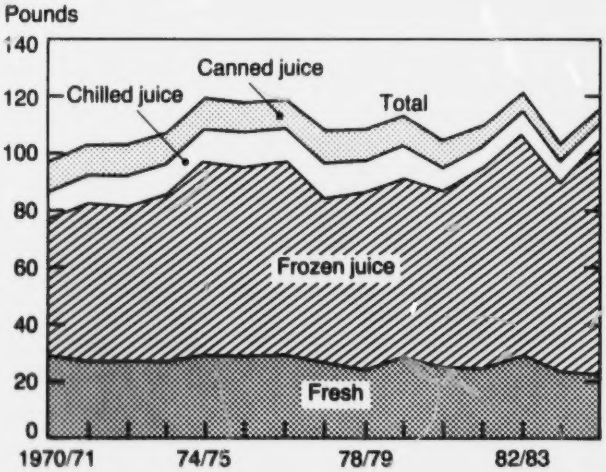


1984/85 preliminary, 1985/86 forecast. Production of all citrus fruits. Season average growers' prices weighted by production. Crop years.

Chart 283

Per Capita Consumption of Citrus Fruit

Per capita citrus consumption in 1985 was up substantially from 1984 due to the sharp increase in frozen concentrated orange juice.

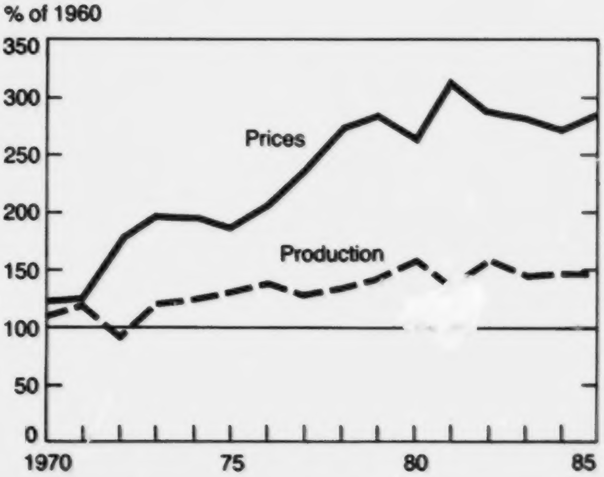


1984/85 preliminary. Fresh-equivalent basis. Six fruit items are not included in this new per capita fruit consumption series.

Chart 284

Noncitrus Fruit Production and Farm Prices

Noncitrus fruit production for 1985, at 14.2 million tons, was down slightly from 1984, due primarily to the decrease in apples and peaches.

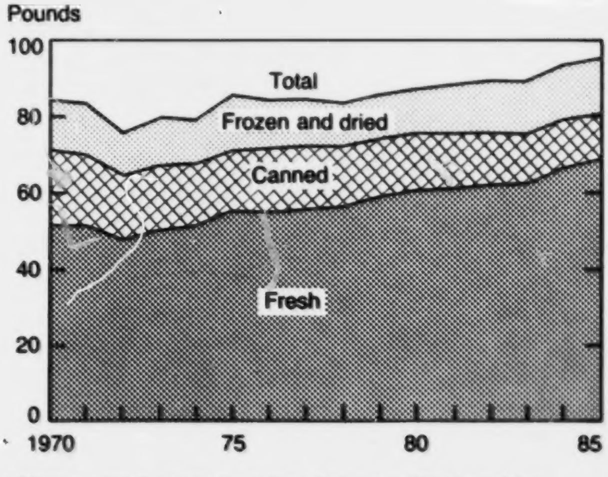


1985 preliminary. Production of 15 major fruits. Season average growers' price weighted by production.

Chart 285

Per Capita Consumption of Noncitrus Fruit

Per capita noncitrus consumption in 1985 was up slightly from 1984. Fresh fruit accounted for 72 percent of total noncitrus consumption.



1985 preliminary. Fresh-equivalent basis. Canned includes fruit and juice. Twelve fruit items are not included in this new per capita fruit consumption series.

Chart 286

Destination of U.S. Fresh Fruit Exports

U.S. exports of fresh fruit during 1985 ran 2 percent below 1984. Citrus fruit, mostly oranges, grapefruit, and lemons, were the most important export items.

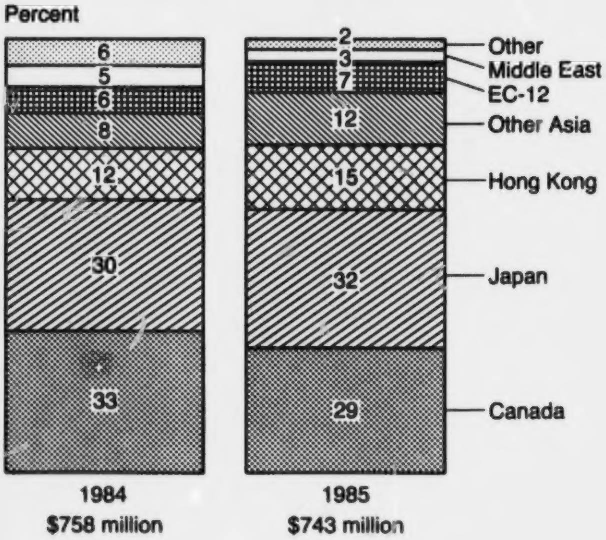


Chart 287

Destination of U.S. Tree Nut Exports

U.S. exports of tree nuts during 1985 totaled $514 million, 23 percent greater than in 1984. Almonds and walnuts were the principal export items.

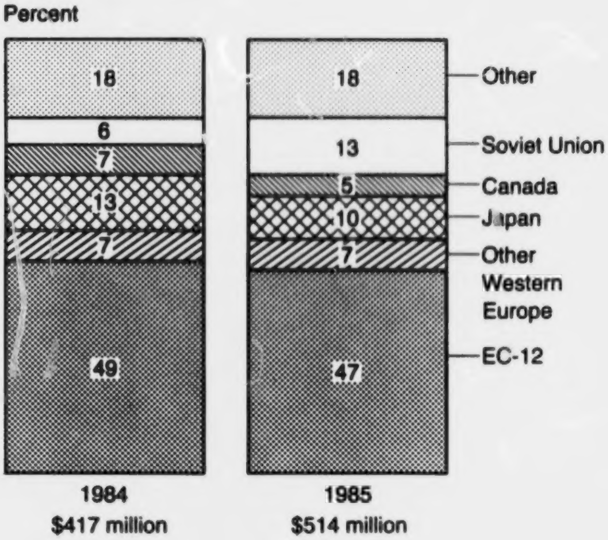
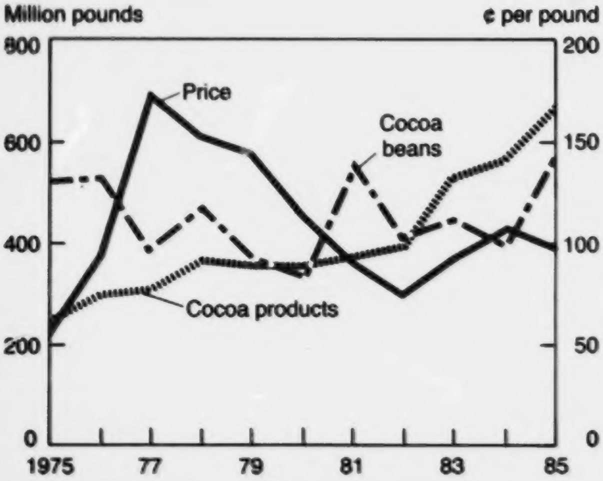


Chart 288

U.S. Cocoa Imports and Prices

U.S. per capita cocoa consumption rose to 4.5 pounds in 1985 as prices averaged lower than in 1984. Cocoa supplies continue abundant in 1986.

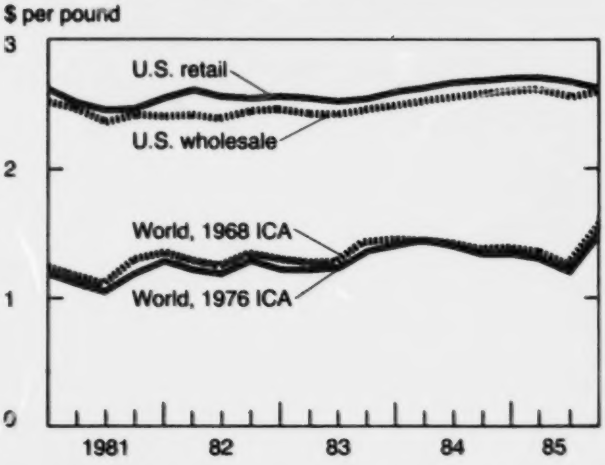


Price for cocoa beans is the average of nearest-three active futures trading months on the Coffee, Sugar, & Cocoa Exchange, Inc.

Chart 289

World and U.S. Coffee Prices

The recent drought in Brazil resulted in a sharply smaller 1986/87 coffee crop. World green coffee prices in 1986 should average above 1985's $1.38 a pound.

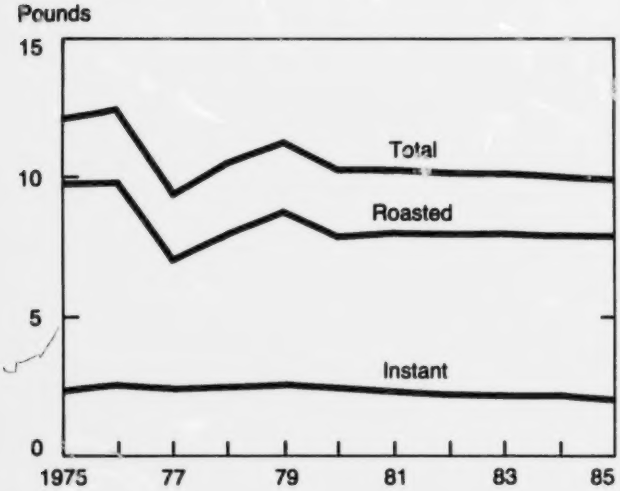


Roasted for United States and green bean for world. ICA is International Coffee Agreement. 1976 ICA based on composite of other mild arabica and robusta coffees.

Chart 290

U.S. per Capita Consumption of Coffee

Consumption of coffee, the leading U.S. farm import, fell slightly in 1985. Value of green coffee imports also fell slightly to $3.13 billion.

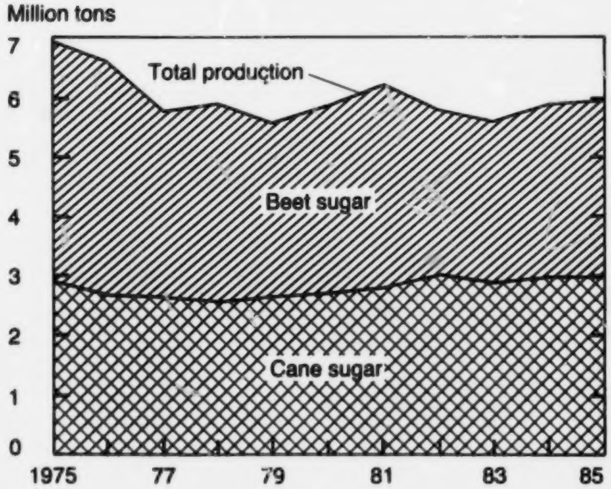


1985 preliminary. Green bean equivalent.

Chart 291

U.S. Beet and Cane Sugar Production

U.S. beet and cane sugar production both increased in 1985, as both acreage harvested and yields were higher. Beet sugar production rose 3 percent.



Raw value. Crop year beginning September 1. Does not include Puerto Rico.

Chart 292

Sources of Sugar Used in the United States

U.S. sugar imports in 1985 fell about 20 percent from 1984. Domestic production accounted for almost 70 percent of total sources, up about 5 percent from 1984.

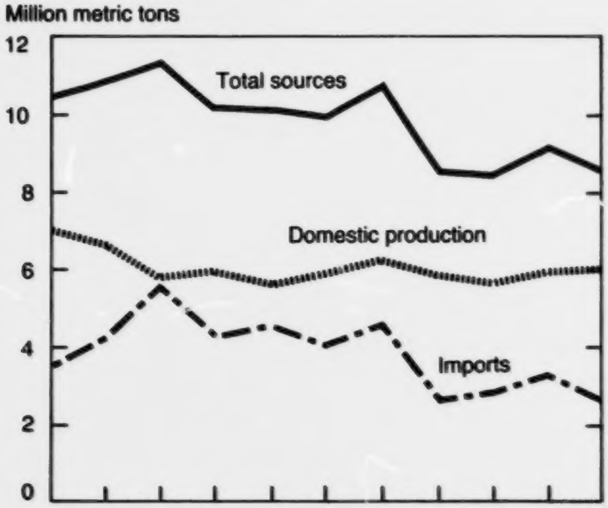


Chart 293

U.S. Sugar Prices

U.S. sugar prices fell in 1985 due to large beginning stocks and lower domestic consumption. Retail prices fell slightly but have remained stable over the last 4 years.

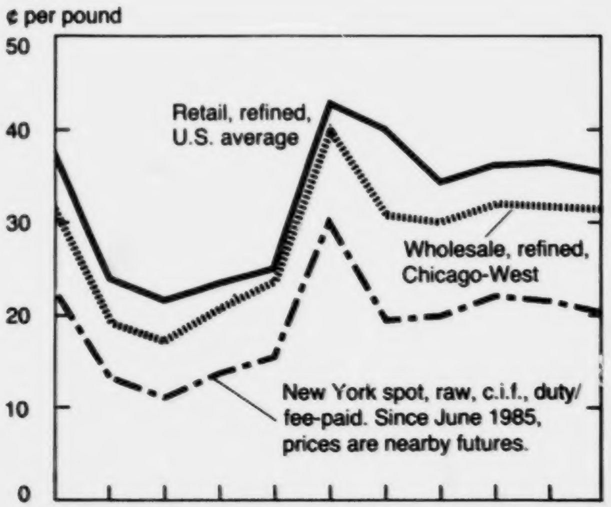


Chart 294

Per Capita Consumption of Caloric Sweeteners

U.S. consumption of caloric sweeteners rose in 1985 for the fourth straight year to 15.52 million short tons. High fructose corn syrup consumption rose 21 percent from 1984, as it continued to be substituted for sugar by the beverage industry.

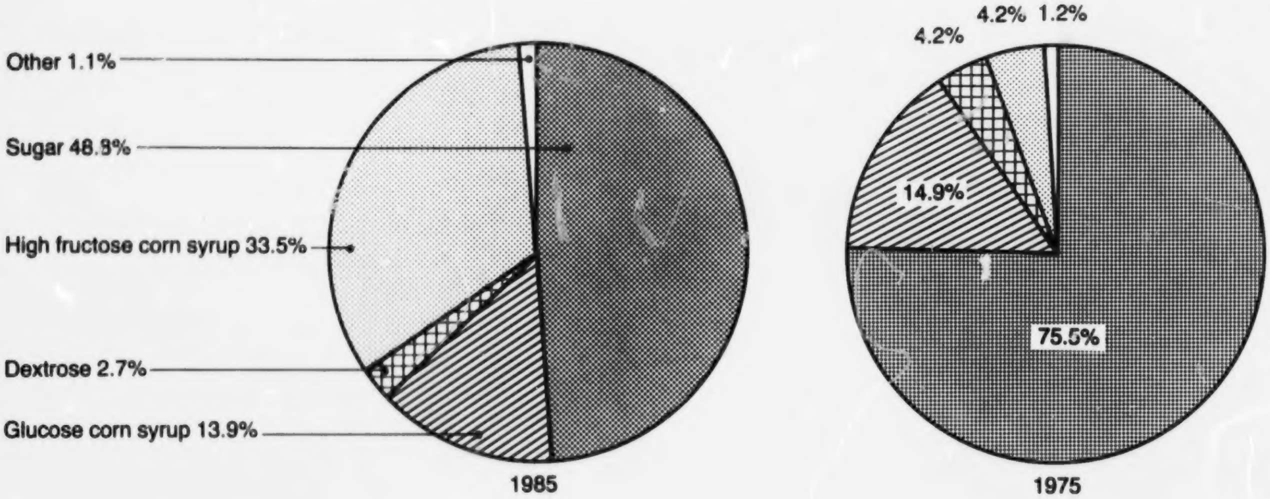
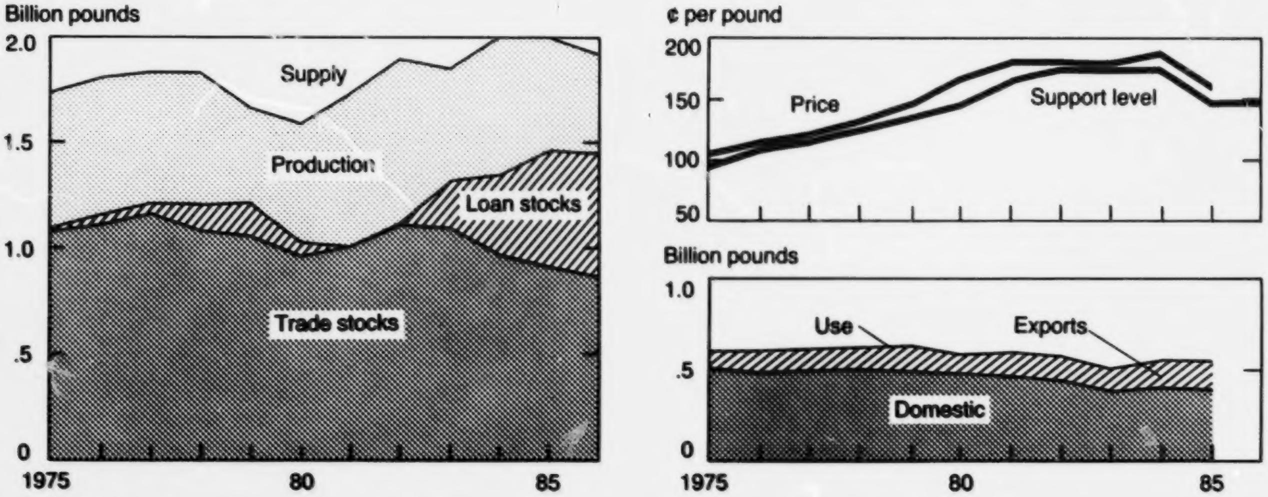


Chart 295

Burley Tobacco: Supply, Price, Use

Total 1986 U.S. tobacco production, both burley and flue-cured, is forecast at almost 1.2 billion pounds, down 21 percent from 1985 and the smallest crop since 1936. The burley support rate was reduced 30 cents to $1.49 a pound in 1985, and will remain there in 1986.

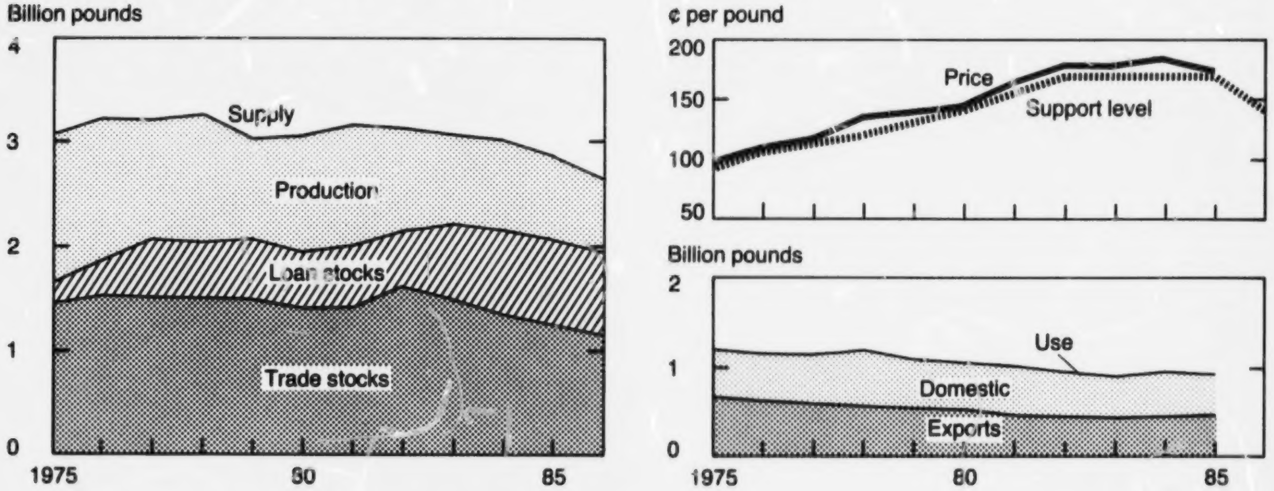


1985 preliminary, 1986 forecast. Trade stocks include manufacturers' and dealers'. Crop year beginning October 1.

Chart 296

Flue-Cured Tobacco: Supply, Price, Use

The 1986 flue-cured supply is about 2.9 times the amount of flue-cured used in 1985. Carryover next July 1 will likely fall. Prices averaged $1.41 a pound through August 21, or 13 cents below last season's prices.

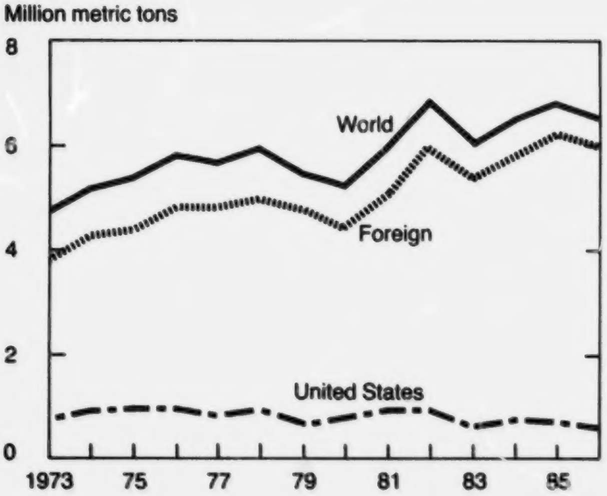


1985 preliminary, 1986 forecast. Trade stocks include manufacturers' and dealers'. Crop year beginning July 1.

Chart 297

Unmanufactured Tobacco Production

Total world unmanufactured tobacco production is forecast at 6.6 million tons, 4 percent below 1985. China's crop, the largest producer, was down 7.5 percent from 1985.

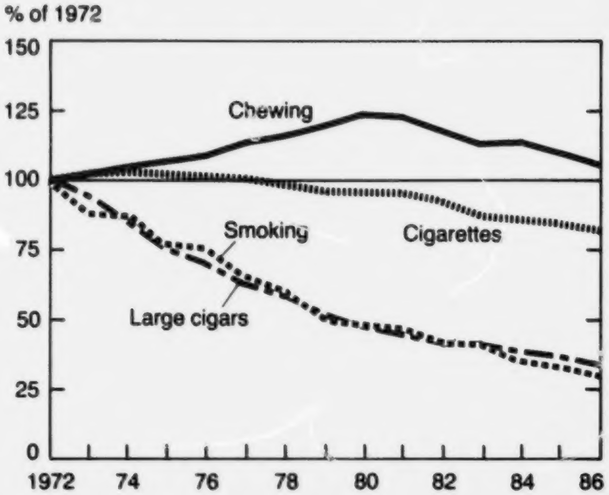


1985 preliminary, 1986 forecast.

Chart 298

Consumption of Tobacco Products

Per capita consumption of cigarettes, chewing tobacco, cigars, and smoking tobacco declined again in 1986.



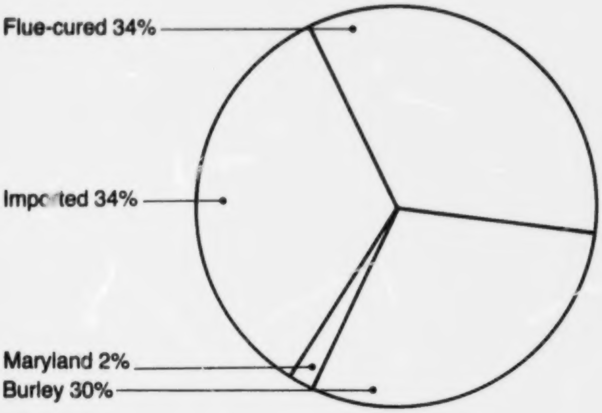
1986 preliminary.

117

Chart 299

Tobacco Use in Cigarettes

Proportion of imported tobacco in cigarettes has risen steadily, from 14 percent in 1970 to 34 percent in 1985.

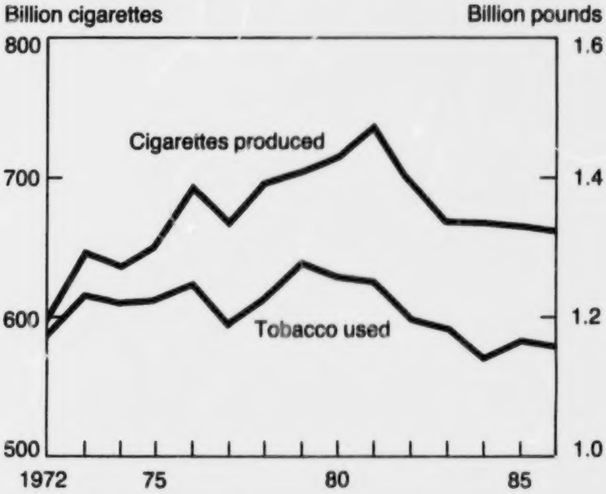


1983-85 average.

Chart 300

Cigarettes Produced and Tobacco Used

Quantity of tobacco used remained relatively stable through the 1970's. Both cigarette production and tobacco use have fallen since 1981, however.



1986 forecast. Billion pounds in unstemmed processing weight.

Chart 301

U.S. Bulk Carrier Tonnage

The U.S. bulk carrier fleet consisted of only 17 vessels in 1985 and could carry only a tiny fraction of U.S. grain exports.

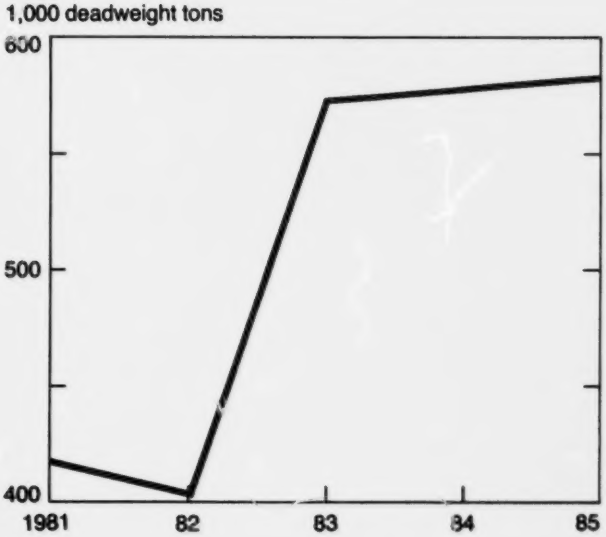


Chart 302

World Bulk Carrier Tonnage

Capacity of the world bulk fleet has outstripped international trade in grain and other bulk cargoes since 1981.

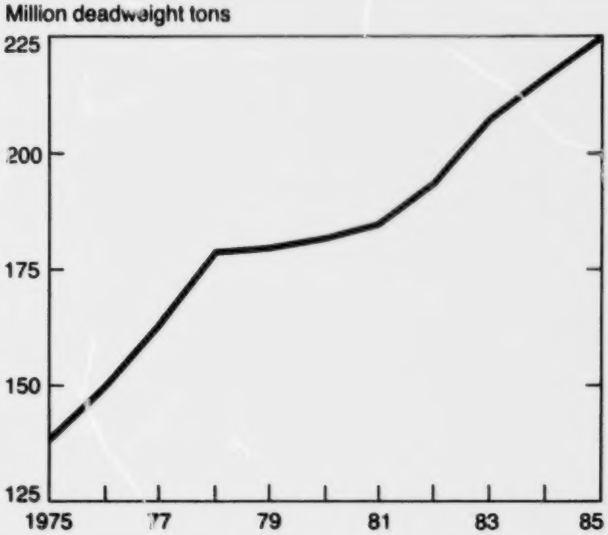
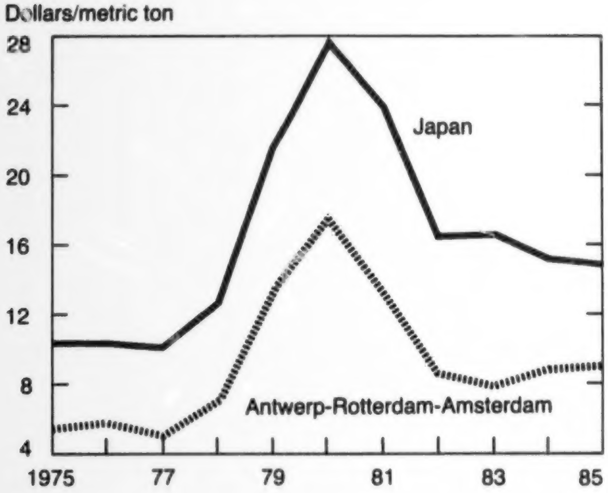


Chart 303

Ocean Freight Rates from U.S. Gulf

Relatively little international grain trading and a surplus of ocean vessels have held rates for heavy grains below 1980 record levels.



1985 preliminary.

Chart 304

Rail Freight Rates for Agricultural Products

Rail rates rose only slightly during 1985, reflecting slackening demand and only modest operating cost increases. Rates for food products averaged 1 percent higher.

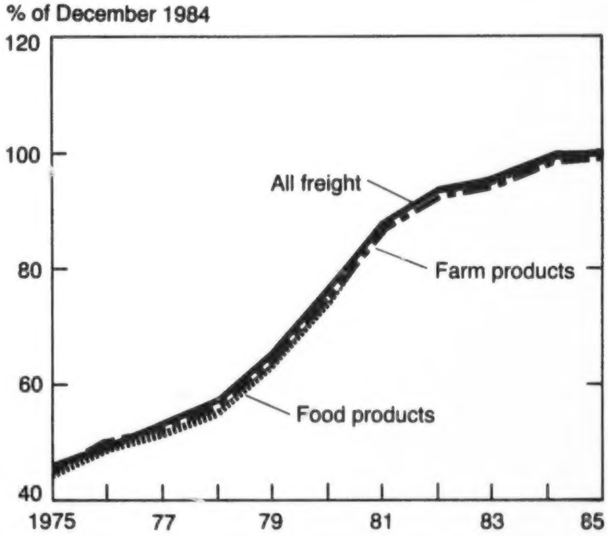


Chart 305

Spot Barge Rates for Grain

Rates charged by barge carriers are volatile and greatly influenced by export demand. A surplus of barges and decreased exports have held barge rates down.

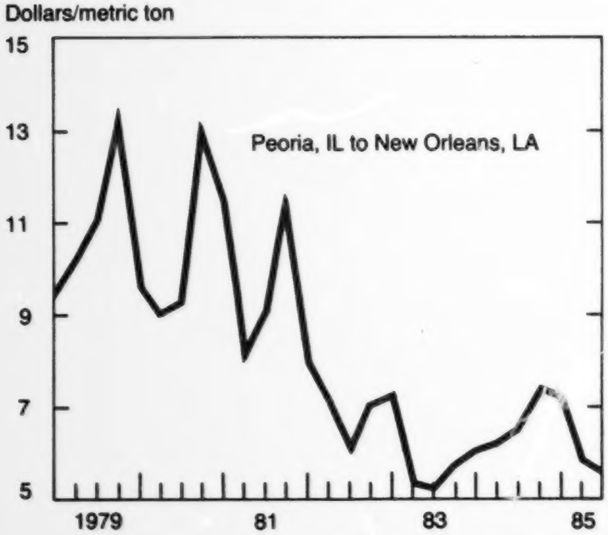


Chart 306

Barge Loadings of Grain, Interior River Points

Much of barged grain moves down the Mississippi River to export points. A 27-percent decrease in grain exports from gulf ports caused the sharp fall in barge loadings.

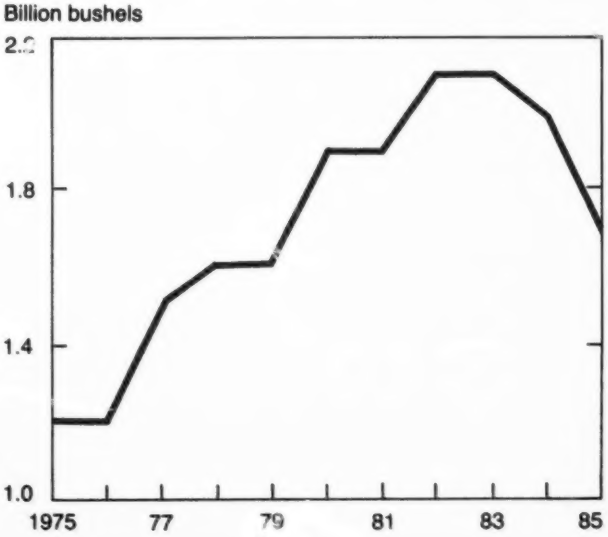


Chart 307

Carloads of Grain Shipped by Rail

Volume of exports greatly influences shipments of grain by rail. The sharp drop in railcar loadings during 1985 chiefly resulted from a 23-percent decline in exports.

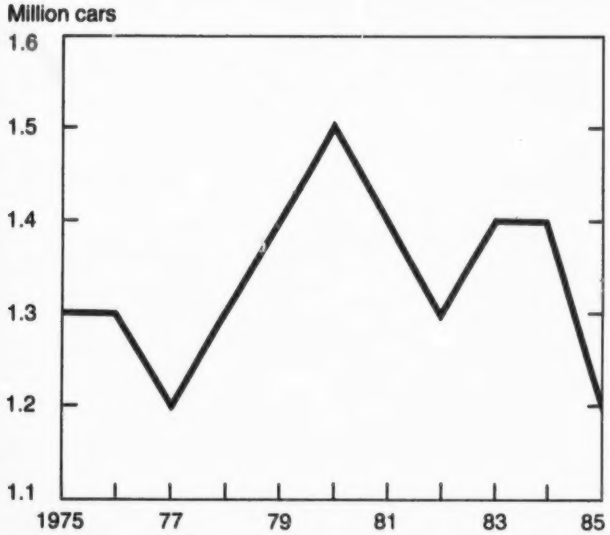
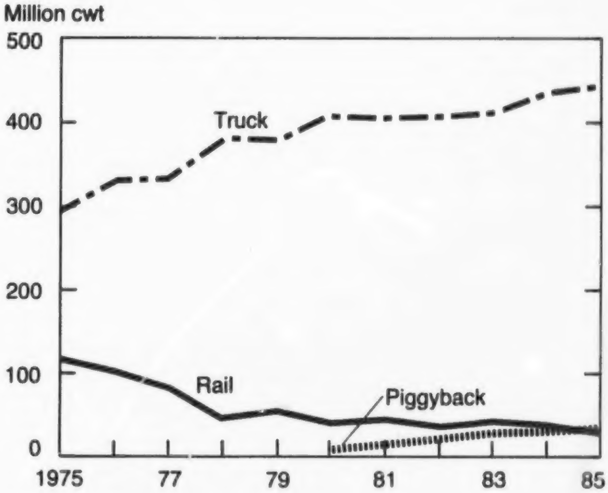


Chart 308

Fresh Fruits and Vegetables Shipped by Truck, Rail, and Piggyback

Most fresh produce delivered by truck has a longer shelf life than if delivered by competing modes, so trucks carry most of the produce.



Piggyback included in rail before 1980.

Chart 309

Cost of Hauling Fresh Produce by Truck

Truck costs in the early 1980's were forced upward by rapidly rising fuel prices. As fuel prices stabilized in 1983, insurance and licensing costs started to climb.

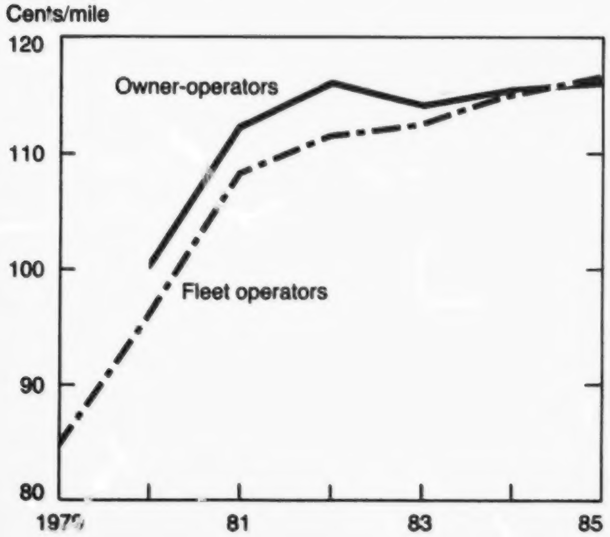
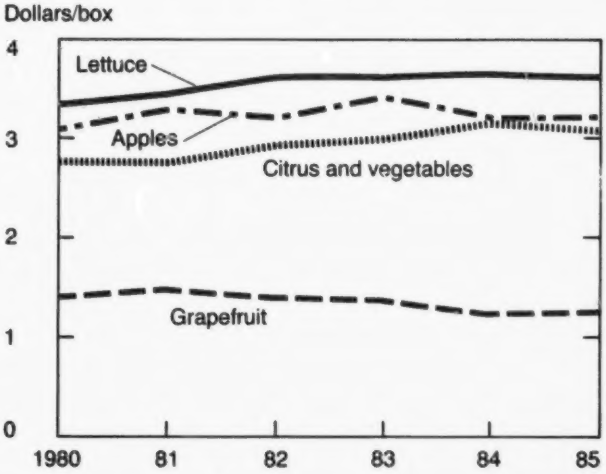


Chart 310

Truck Rates for Fresh Produce

With more trucks competing for produce hauls, rates have remained constant despite rising truck operating costs.



Grapefruit rates for Florida to New York City. All other produce for west coast to New York City.

Index (by chart number)

Names following each listing in the index are the contacts for those particular charts. Contact those persons directly for more information about those charts.

Assets
  Farm 28 *(J. Ryan, 202-786-1798)*
  Personal 177 *(J. Courtless, 301-436-8461)*

Banking 133-136 *(P. Sullivan, 202-786-1884)*

Cattle (see Livestock)
Child Care 174 *(J. Courtless, 301-436-8461)*
Child Nutrition Programs 182-184 *(J. Braden, 703-756-3170)*
Coarse Grains
  Exports 255 *(C. Goldthwaite, 202-447-3179)*
  Export Competitors 218, 219 *(S. Milmoe, 202-786-1621)*
Cocoa 288 *(C. Hicks, 202-786-1769)*
Coffee 289, 290 *(C. Hicks, 202-786-1769)*
Conservation
  74-76, 78 *(D. Gadsby, 202-786-1435)*
  79-82 *(M. Dicks, 202-786-1401)*
  83 *(D. Colacicco, 202-786-1435)*
Consumer
  Price Index 138 *(R. Monaco, 202-786-1283)*
    Food, Crop, Livestock Products 139-141 *(R. Parlett, 202-786-1870)*
  Prices
    26 *(D. Wills, 202-786-1286)*
    142-145 *(D. Dunham, 202-786-1870)*
    175 *(J. Courtless, 301-436-8461)*
Consumption
  Food 150-157, 280 *(K. Bunch, 202-786-1870)*
Cooperatives (see Farmer Cooperatives)
Corn 259, 260 *(S. Frye, 202-786-1840)*
  190 *(S. Milmoe, 202-786-1621)*
Costs and Returns, Farm *(B. McElroy, 202-786-1801)*
Cotton, Cottonseed 267, 270 *(R. Hoskin, 202-786-1840)*
  Exports 271 *(Q. Gray, 202-382-9514)*
    190, 191 *(S. Milmoe, 202-786-1621)*
  Export Competitors 217 *(S. Milmoe, 202-786-1621)*
  World Production and Consumption 272 *(Q. Gray, 202-382-9514)*
Cropland (see also Land)
  53, 54 *(R. Hexem, 202-786-1420)*
  60 *(J. Jones, 202-786-1428)*
  65 *(R. Heimlich, 202-786-1419)*
  69 *(J. Hanchar, 202-786-1411)*
  186 *(S. Milmoe, 202-786-1621)*
Crop (see also individual commodities)
  Production Costs 50 *(R. McElroy, 202-786-1801)*

Dairy 231, 233-237 *(J. Miller, 202-786-1830)*
  Global Stocks 232 *(S. Miller, 202-786-1621)*

Debt 29-33 *(J. Ryan, 202-786-1798)*
Diet (see Nutrition)
Drainage (see Land Drainage)

Economic Indicators (see Indicators, Economic)
Employee Benefits 170 *(J. Courtless, 301-436-8461)*
Employment
  Farm 4 *(M. Butler, 202-786-1534)*
  Food and Fiber System 24 *(D. Wills, 202-786-1298)*
  Metro/Nonmetro 120-125 *(C. Long, 202-786-1544)*
  Nonmetro 102-104 *(F. Hines, 202-786-1526)*
    127, 128 *(P. Myers, 202-786-1549)*
  Women 171 *(J. Courtless, 301-436-8461)*
Energy Prices, Use 48, 49 *(M. Gill, 202-786-1456)*
Erosion 73, 77 *(D. Colacicco, 202-786-1435)*
Exports (see also individual commodities)
  U.S. 188-206 *(S. Milmoe, 202-786-1621)*
  Foreign 207, 208, 213-219 *(S. Milmoe, 202-786-1621)*

Family Economics 172-174 *(J. Courtless, 301-436-8461)*
Family Food Costs
  158 *(D. Odland, 301-344-2513)*
  159-160 *(R. Kerr, 301-435-5302)*
Farmer Cooperatives 87-100 *(C. Adams, 202-447-8614)*
Farm Dependent Counties 100-104 *(F. Hines, 202-786-1526)*
Farm Income
  8-11, 16 *(B. Whittington, 202-786-1804)*
  14 *(N. Brooks, 202-786-1524*
  17 *(R. Kodl, 202-786-1803)*
  18, 27 *(L. Farmer, 202-786-1798)*
Farm
  Machinery 42, 43 *(C. Sisco, 202-786-1456)*
  Numbers 2 *(J. Ryan, 202-786-1798)*
  Population 1, 3, 4 *(M. Butler, 202-786-1534)*
  Real Estate 34, 35 *(R. Jeremias, 202-786-1889)*
    Loans 36 *(J. Ryan, 202-786-1798)*
  Size 12-15 *(N. Brooks, 202-786-1524)*
    70 *(J. Hanchar, 786-1411)*
Farmworkers 5-7 *(J. Cox, 202-786-1932)*
Feedgrains 256-261 *(S. Frye, 202-786-1840)*
  World and U.S. Production and Exports 211 *(S. Milmoe, 202-786-1621)*
Fertilizer 46, 47 *(P. Andrilenas, 202-786-1456)*
Fibers 268, 269 *(J. Lawler, 786-1840)*
Food
  Prices (see also Consumer, Prices)
    142-145 *(D. Dunham, 202-786-1870)*
  Consumption (see Consumption, Food)
  Marketing 146-149 *(D. Dunham, 202-786-1870)*
Food and Fiber System 19-22, 24 *(D. Wills, 202-786-1286)*
Food Distribution 185 *(J. Braden, 703-756-3170)*
Food Grains, World and U.S. Production and Exports 210 *(S. Milmoe, 202-786-1621)*
Food Stamps 178-180 *(J. Braden, 703-756-3170)*
Fruit 282-285 *(W. Napper, 202-786-1766)*
  Exports 286 *(E. Missiaen, 202-447-3275)*

Government Food Programs 178-185 *(J. Braden, 703-756-3170)*
Grain 261 *(S. Frye, 202-786-1840)* (see also Food Grains and Feedgrains)
Gross National Product
  23, 25 *(D. Wills, 202-786-1286)*
  137 *(R. Monaco, 202-786-1283)*

Health Care 165 *(J. Courtless, 301-436-8461)*
Hired Farmworkers (see Farmworkers)
Hogs 227 *(C. Nuckolls, 202-786-1830)*
Housing 107 *(E. Dagata, 202-786-1537)*

Imports (see Exports and individual commodities)
Income
  Family
    111 *(E. Dagata, 202-786-1537)*
    169, 171 *(J. Courtless, 301-436-8461)*
  Farm (see Farm Income)
  Personal
    108-110 *(R. Hoppe, 202-786-1537)*
    168 *(J. Courtless, 301-436-8461)*
Indicators
  Economic 137, 138 *(R. Monaco, 202-786-1283)*
  International 186, 187 *(S. Milmoe, 202-786-1621)*
Interest Rates 36, 37 *(J. Ryan, 202-786-1798)*
International Indicators (see Indicators, International)
Irrigation 66-72 *(J. Hanchar, 202-786-1411)*

Land
  Farmland 59 *(A. Bernat, 202-786-1428)*
    66 *(J. Hanchar, 202-786-1411)*
  Drainage 62-64 *(G. Pavelis, 202-786-1448)*
  Ownership 61 *(P. DeBraal, 202-786-1425)*
  Use 52-55 *(R. Hexem, 202-786-1420)*
  Values 56-58 *(J. Jones, 202-786-1428)*
Livestock
  Trade 220-222 *(H. Schmick, 202-447-7867)*
  Production Costs 51 *(B. McElroy, 202-786-1801)*
  Production 223-230 *(C. Nuckolls, 202-786-1830)*
Loan Rates 176 *(J. Courtless, 301-436-8461)*
Local Government 129-132 *(R. Reeder, 202-786-1545)*

Machinery, Farm (see Farm Machinery)
Manufacturing Dependent Counties 126-128 *(P. Myers, 202-786-1545)*
Marketing, Food (see Food, Marketing)
Meat 230 *(C. Nuckolls, 202-786-1830)*
  Imports 222 *(H. Schmick, 202-447-7867)*

Nutrition 164 *(A. Cook, 301-436-8466)*
Nursing Homes 167 *(J. Courtless, 301-436-8461)*
Nuts 287 *(E. Missiaen, 202-447-3275)*

Oilseeds Production and Exports 212 *(S. Milmoe, 202-786-1621)*
Pesticides 44, 45 *(H. Delvo, 202-786-1456)*
Population (see also Farm, Population)
  Regional 105, 106 *(M. Butler, 202-786-1534)*
  Nonmetro 101 *(F. Hines, 202-786-1526)*
  Growth Rates, International 187 *(S. Milmoe, 202-786-1621)*
Potatoes 281 *(B. Johnson, 202-786-1767)*
Poultry and Eggs 238-247 *(A. Baker, 202-786-1826)*
Poverty 112, 114, 115, 117 (E. Dagata, 202-786-1537)
  113 *(R. Hoppe, 202-786-1537)*
  166 *(J. Courtless, 301-436-8461)*
Production, World and U.S. Agricultural 209-212 *(S. Milmoe, 202-786-1621)*
Prices
  Consumer (see Consumer, Prices)
  Farm 26 *(D. Wills, 202-786-1286)*
    38, 39 *(R. Kodl, 202-786-1803)*
    40, 41 *(C. Cobb, 202-786-1803)*
  Food 142-145 *(D. Dunham, 202-786-1870)*
  Retail (see Consumer, Prices)
Production (see individual commodities)
Productivity
  83 *(D. Colacicco, 202-786-1435)*
  84 *(D. Dvoskin, 202-786-1405)*
  85, 86 *(C. Cobb, 202-786-1803)*

Real Estate (see Farm, Real Estate)
Rice 252, 253 *(Janet Livezey, 202-786-1840)*
  Export Competitors 216 *(S. Milmoe, 202-786-1621)*
  World Producers 254 *(C. Goldthwaite, 202-447-3179)*
Rural Finances 133-136 *(P. Sullivan, 202-786-1884)*

School Lunches 182 *(J. Braden, 703-756-3170)*
School Programs 182, 183 *(J. Braden, 703-756-3170)*
Sheep 225 *(C. Nuckolls, 202-786-1830)*
Soybeans 190, 191 *(S. Milmoe, 202-786-1621)*
  Export Competitors 215 *(S. Milmoe, 202-786-1621)*
    262, 264 *(D. Pumphrey, 202-382-8232)*
  U.S. Exports 263 *(D. Pumphrey, 202-382-8232)*
  U.S. Production 265 *(R. Hoskin, 202-786-1840)*
Sugar 291, 293 *(C. Hicks, 202-786-1769)*
  Sources 292 *(C. Brick-Turin, 202-447-2916)*
Sunflowerseeds 266 *(D. Pumphrey, 202-382-8232)*
Sweeteners 294 *(C. Hicks, 202-786-1769)*

Taxes 116 *(R. Hoppe, 202-786-1537)*
Tillage 75, 76, 78 *(D. Gadsby, 202-786-1435)*
Tobacco 295, 296, 298-300 *(L. Creek, 202-786-1840)*
  World Production 297 *(J. Reynolds, 202-382-9495)*
  191 *(S. Milmoe, 202-786-1621)*
Trade, Trade Balance, U.S. 188-219 *(S. Milmoe, 202-786-1621)*
Transportation 301-310 *(T.Q. Hutchinson, 202-786-1864)*

Unemployment 118, 119 *(S. Pollack, 202-786-1540)*
  Rate 138 *(R. Monaco, 202-786-1283)*
  And Food Stamps 179 *(J. Braden, 703-756-3170)*

Vegetables
  Production, Use 278, 281 *(B. Johnson, 202-786-1767)*
  Exports 279 *(E. Missiaen, 202-447-3275)*
  Consumption 280 *(K. Bunch, 202-786-1870)*
Vitamin E 160-163 *(N. Raper, 301-436-5809)*

Wheat 248, 249 *(A.G. Schienbein, 202-786-1840)*
  Export Competitors 213, 214 *(S. Milmoe, 202-786-1621)*
    250 *(C. Goldthwaite, 202-447-3179)*
  U.S. Exports 251 *(C. Goldthwait, 202-447-3179)*
    190, 191 *(S. Milmoe, 202-786-1621)*
WIC 181 *(J. Braden, 703-756-3170)*
Wool 273-276 *(J. Lawler, 202-786-1840)*

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